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ABSTRACT

This manual is intended to help people working in local libraries collect and report statistics about what they do and complete the Texas State Library annual report form. Texas uses the annual reports to determine whether local libraries are eligible for membership in the Texas library system. Definitions and explanations are given for information requested in the following categories: (1) general information about the library; (2) financial statistics; (3) library collections and services; and (4) other information about the library. The value and use of statistics for program justification and the measurement of effectiveness are discussed; and how the state uses the statistics is reviewed. Three appendixes contain sample forms, sample graphic representations, and the annual report and membership application form. (SLD)

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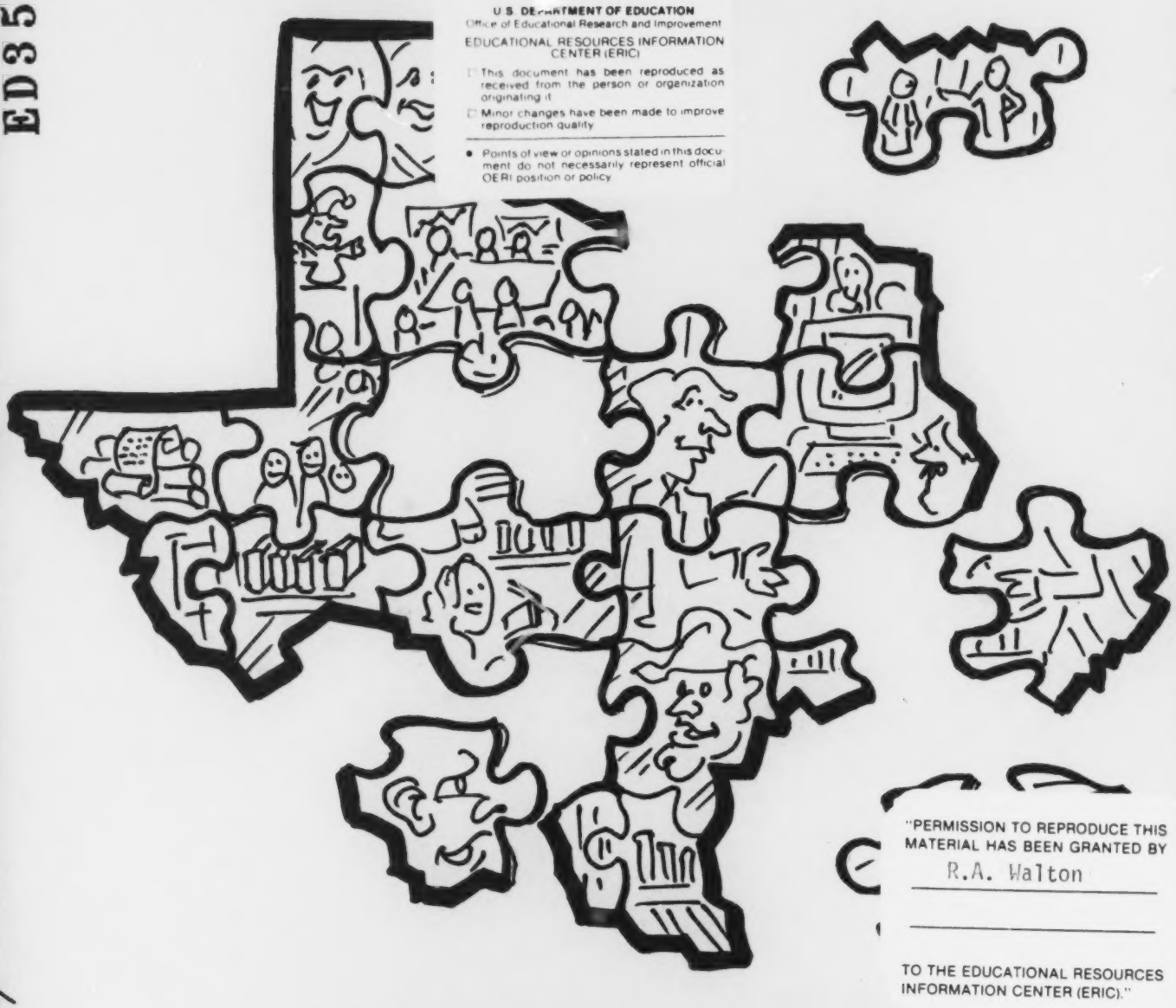
COUNTING WHAT YOU DO

A Guide to Collecting and Reporting Public Library Statistics



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COUNTING WHAT YOU DO

A GUIDE TO COLLECTING AND REPORTING PUBLIC LIBRARY STATISTICS

TEXAS STATE LIBRARY

AUSTIN, TEXAS

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Preface

The intention of this manual is to help people working in local public libraries collect and report statistics about what they do. We hope that this manual will help you understand and fill out our Annual Report form. We also hope that it will help you improve your techniques for collecting statistics. Finally, we hope that the manual will suggest to you ways in which you can use statistics to further your own library.

Most of the funding for this manual, as well as a related video tape to be produced later this year, came from a grant from the U.S. National Commission on Libraries and Information Science with funds from the National Center for Education Statistics of the U.S. Department of Education. The manual was produced by the staff of the Library Development Division of the Texas State Library. The manual was written and edited by Mark Smith with assistance from Lisa deGruyter, Barbara Crosby, Kay Steed and Bell Clarke. Kay Easter produced the camera-ready pages and prepared the sample forms in the appendix. Kevin Middleton provided the illustrations.

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Introduction

Imagine the following conversation between two head librarians. They are standing at the coffeepot at a system membership meeting. Nancy, the librarian at the Lasso Loop Public Library, is chatting with John from the Farfetched County Library.

John: Hi there, Nancy. How are things over in Lasso Loop?

Nancy: Fine, John. Busy, though. You know we are having a groundbreaking on our new building next month.

John: (enviously) Yes, congratulations.

Nancy: And we just got a big boost in our book budget to buy materials for the new building and to put in a new automation system.

John: Wow! Well, it must be nice to work in such a rich town.

Nancy: Actually, the average income in our town is about the same as yours.

John: (Taken aback) But, how do you know that?

Nancy: I use statistics a lot.

John: Statistics? You've got to be kidding. Only big libraries use statistics.

Nancy: I use them and we're not a big library. My service area is actually smaller than yours.

John: Well, I don't think I could ever use them. They're such a bother.

Nancy: Then how do you know how your circulation compares with other libraries? What do you use to brag about your library to the board or to the county commissioners? How do you know when an activity is successful or not? I'll give you an example. This year was the first time we had story hours as part of the summer reading program. Circulation for all types of books was 20% higher than last year! When I told my board that, they agreed to a big increase in my program budget to cover new activities next year.

John: You do all that just with statistics?

Nancy: Sure, but that's not all. I use them to compare our budget with other libraries around the state. I even use them to argue for more money for salaries, including my own.

John: But, where do all these statistics come from?

Nancy: Mainly I just use the ones that we collect for the annual report. You do an annual report, don't you?

John: Oh, yeah, but I don't spend too much time on it. After all, it's just a technicality the State Library requires. I mostly just estimate the numbers I put on the form.

Nancy: Well, for heaven's sake, John, don't do that.

John: Why not? After all, nobody cares much about what us little libraries do.

Nancy: I care, John. See, I compare my library to other libraries of the same size across the state, including yours. When I was discussing salaries with my board last fall, I argued that you pay your pages more than we do, so I was able to get them an increase. I need accurate figures in order to build a strong case and so that I know I'm getting a true picture.

John: Really? We pay our pages more? Okay, I'm a believer, but do you think I could do what you do with statistics? Frankly, our funding situation is so bleak, I'd be willing to try anything.

Nancy: Sure, I'd be glad to talk to you more about it. We do charts and graphs but you don't have to get that fancy. Just to know what the figures are is sometimes good enough.

John: Great. Now I'm getting excited.

Nancy: But the first thing you need to do is to start collecting reliable statistics. That will help you and me both out. Is it a deal?

John: It's a deal. Say, I'm glad we talked. And good luck on your groundbreaking!

John is excited about library statistics. He has learned what Nancy already knew: statistics can be valuable to his program. Nancy understands that statistics can be an effective way to know if you're doing a good job and to tell others what you are doing. We hope you already use library statistics in these and other ways. If you do, this manual can help you find ways to make them more accurate and reliable. If you do not, this manual will be an introduction to the nature and uses of statistics.

THE ANNUAL REPORT

The Annual Report and System Membership

The Texas State Library asks that every public library in Texas submit an annual report. The annual report is officially called the Annual Report/System Membership Application (AR/SMA) because filing the form is a requirement for membership in the Texas Library System.

The form asks questions about many aspects of your library service including your library's finances, staff, collection, and services. The answers you provide to these questions are very important.

The State Library uses what you report on the form to determine whether your library is eligible for membership in the Texas Library System. Membership in the system carries privileges and benefits, but it requires that your library meet certain minimum standards from year to year. Staff at the State Library look at your annual report form to determine whether your library has met those minimum criteria. If not, the staff will contact you to make sure the questions have been answered correctly.

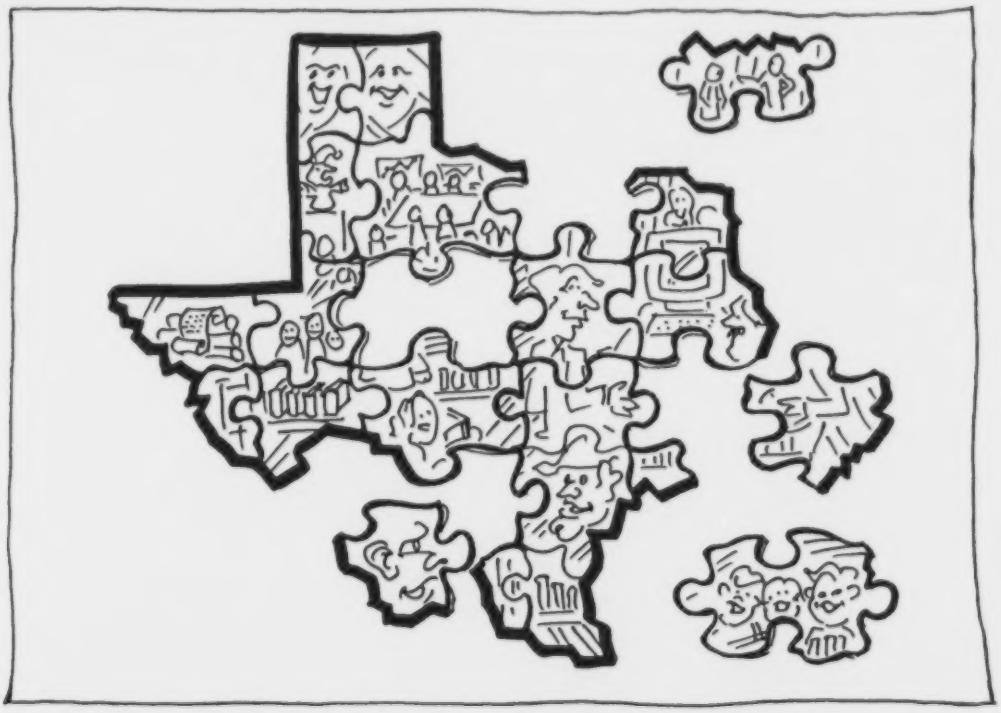
Because the State Library uses your annual report form to determine your accreditation for membership in your library system, it is very important – and in your interest – to keep reliable and accurate statistics through the year for your library.

Texas Public Library Statistics

After the State Library staff has used your report to determine your membership status in the library system, they use the data reported on the form to produce the annual *Texas Public Library Statistics*. Your library's statistics are merged with those from every other reporting library in a computerized database. The *Texas Public Library Statistics* (informally called the "statbook" or the *Statistics*) contains information on every public library in Texas.

Collectively, the *Statistics* creates a picture of the overall status of public library service in Texas. It is of vital importance that this information be as accurate as possible in order to make the *Statistics* meaningful to anyone who uses it.

The final chapter of this manual contains a discussion of these and other uses of the data you submit on your annual report form.



YOUR ANNUAL REPORT HELPS THE STATE LIBRARY PUT TOGETHER AN OVERALL PICTURE OF PUBLIC LIBRARY SERVICE IN TEXAS

Changes in the Form

Many people filling out the form do not realize that it changes every year. The State Library makes changes in the form for various reasons. Perhaps the National Center for Education Statistics requests new information. Perhaps the State Library finds that the way information was requested was not clear enough. Sometimes librarians request new information to be gathered. These are just some of the reasons that the form may change from year to year.

The State Library tries to keep changes in the form to a minimum. This means that the overall form may look almost exactly the same as the previous year. Because it looks the same, some libraries may answer questions in the same way they answered them the previous year.

A perfect example of problems that arise when the form changes occurred in 1990. A slight change in the wording of the question about library hours caused more than 75% of the libraries to answer the question incorrectly!

If you ever have a problem filling out the form or if you do not understand what a question is asking for, you should call the Texas State Library for help (512/463-5466).

Let's begin now to look at exactly what statistics the annual report form asks for, and how you can collect that information. The order in which we discuss these items will be the same order in which they appear on the annual report form.

GENERAL INFORMATION ABOUT YOUR LIBRARY

In addition to statistical data, the annual report form asks several general questions about your library. The State Library publishes this information in the directory section of the *Statistics*. Let's look at each of these questions in the order in which they appear on the annual report form.

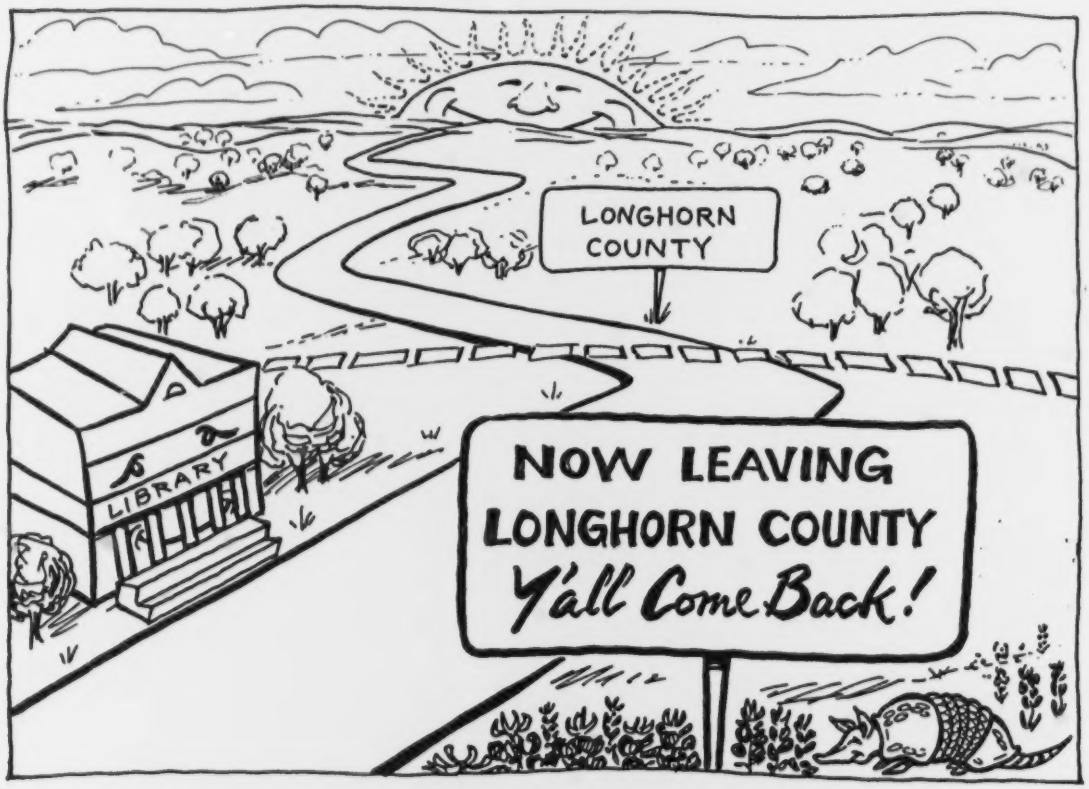
The Fiscal Year

The fiscal year (sometimes written FY) is the twelve month period in which your budget is effective. The fiscal year may start and end any time within the calendar year. For example, the fiscal year for the state of Texas starts on September 1 each year and ends on August 31.

For your library, you will have the same fiscal year as your funding authority. That is, if you are a city library and your city's fiscal year starts on June 1, your fiscal year is June 1 to May 31. If you do not know when your fiscal year starts, ask your city or county accounting department.

Your annual report form is due to the State Library no later than 90 days after the end of the fiscal year. That means that if your fiscal year ends October 31, the State Library will expect your form by the end of January. The State Library requires all annual reports to be submitted no later than April 30.

Location of the Library



WHERE IS THE LIBRARY?

Where is the library? That doesn't sound like a tricky question, but sometimes it can be. Is it in the town it is named after? Or the town where it is actually located? Or in the town that is the mailing address? That is why the annual report form asks you to report both the mailing address and the street address.

Example 1:

The towns of Queso City and Bandana both fund the Queso City Public Library. Queso City pays more than Bandana for library service, but the street address of the library is in Bandana.

Queso City should report the street address of the library as Bandana because that is where the library is physically located.

Example 2:

The Longhorn County Public Library is located in an unincorporated area within Longhorn County. The mailing address is Heifer, TX, which is actually outside of Longhorn County.

In this case the Longhorn County Library annual report should give the location of the library as Heifer, even though the mailing address is in a different county.

Names, Addresses and Telephone Numbers

The annual report form asks you for names and addresses of your board chairperson, friends president, head librarian and so forth. This information is used in the directory portion of the *Statistics*. This is where other libraries will find your address or phone numbers when they need them. You should double-check the information for accuracy. For purposes of the annual report, the head librarian and the director are the same position.

When reporting names and addresses on your annual report form, put the information as you want it to appear in the directory section of the *Texas Public Library Statistics*. You may prefer to list your administrative phone number, the circulation desk phone number, or the number of the reference desk.

If you have a FAX machine, but you would prefer that the number not be reported, omit it from your report.

One of the criteria for system membership is that the library have a telephone with a published number. For this reason it is important to list the telephone number in your annual report.

Outlets

What are these "outlets" that are asked for on the annual report form? An outlet is simply any separate location where your library provides service to the public. Most libraries in Texas have only one outlet, the library itself. Many libraries, however, have more than one outlet. The most common types of outlets after the central library are branches and bookmobiles. If

you give service out of more than one location, it can be difficult deciding just what type of outlet that is. The State Library uses the following definitions to make this distinction:

Branch libraries:

Auxiliary units which have: (1) separate quarters, (2) a permanent basic collection of books, (3) an established paid staff position, and (4) a regular schedule for opening to the public. They are, however, administered from a central unit.

A bookmobile:

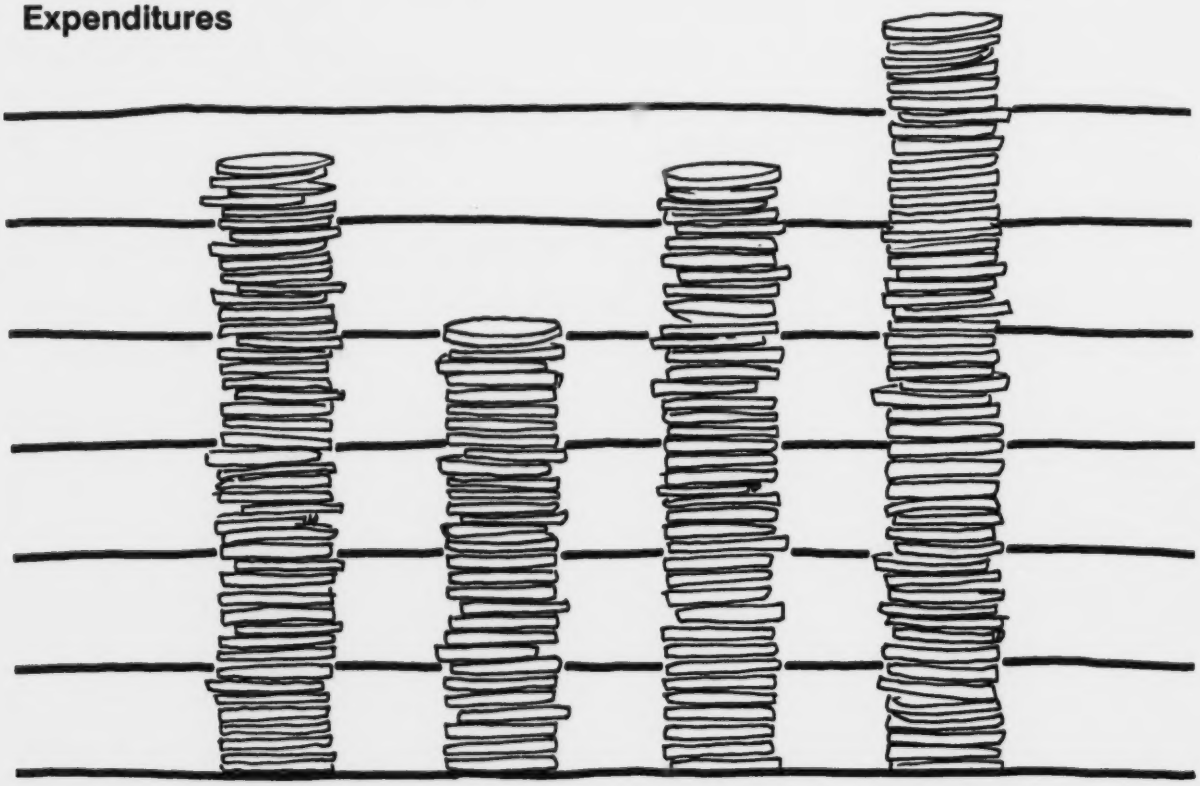
A truck or van specially equipped to carry books and other library materials and serve as a traveling branch library.

A library can have other outlets as well. A small and frequently changed collection of your library's books or other materials that is located in a nursing home, a school, a prison, or any other location, but which doesn't meet the definition of a branch, should be reported as an outlet.

FINANCIAL STATISTICS

Though you might never have thought about it, financial information about your library is a type of library statistic. The amount of money spent for various aspects of library service is a very important statistic and, like all statistics, it must be accurate to be meaningful. Let's begin by discussing how to determine what you spent for library services (expenditures). Then we will move on to where the money came from (income).

Expenditures



EXPENDITURES ARE AN IMPORTANT LIBRARY STATISTIC

Finding out how much you spent for what purpose can sometimes be difficult. If the library pays all its own bills, there should be no trouble finding these figures. Frequently, however, city or county staff pay library bills and finding those figures can sometimes be a problem.

Early in the fiscal year, remind the accounting department in your town or county that you will need a full report on what they spend for the library in several categories. At the end of each month or quarter, the city or county should report expenditures for that period for the library. In such a situation, keep your own records as well and compare to make sure the accounting department's records match yours.

At the end of the year, you may get a computer printout or ledger report with the library included with the other departments of the town or county. You may have trouble reading this report, especially if it lumps all similar costs for the town together. For instance, if your municipality buys three computers and one of them is for the library, the municipality may not record the price of the library computer separately. If you have trouble reading this type of report, or it does not give enough detail about the expenses, explain your needs to the accounting department and ask for help in detailing the expenses.

In some libraries, the staff keeps a separate set of financial records from the town hall as a double check on what the town says was spent for the library. If your city or county accounting department does not pay your bills, you probably already keep track of your own accounts.

You may wish to keep a set of financial books as a check on what your town reports as library service or because they will not provide the information in a format you can use. Establishing a bookkeeping system is the way in which you monitor your income and expenditures. It is how financial statistics are collected.

Setting up a bookkeeping system is a complex task and beyond the scope of this manual. If you are interested in setting up a bookkeeping system in your library, the following book is a step-by-step guide on how to do it:

Alley, Brian and Jennifer Cargill. *Keeping Track of What You Spend: The Librarian's Guide to Simple Bookkeeping*. Phoenix: Oryx Press, 1982. 96 p.

Direct and Indirect Expenditures

When we talk about library expenditures, we often refer to direct and indirect costs, on the local costs of operating the library. The distinction between direct and indirect costs can be confusing.

The easiest way to tell the difference is to look at what was spent and ask: were these costs paid for by money set aside specifically for library purposes? If the answer is yes, then those amounts are direct costs. Direct costs are those which are paid directly out of funds provided specifically for the library by the funding authority.

By contrast, indirect costs are amounts which the funding authority pays for the benefit of the library program. Funds used to pay indirect costs come from a source other than the library budget.

Example 1:

The town of Kickbucket supports a public library. The town budgets about $100,000 a year for the library. Every three months, the town transfers one quarter of this amount, $25,000, to the library. The library then uses this money to pay its bills. The town supports the library in other ways besides the $100,000 budget. The public works department of Kickbucket cuts the grass and does odd jobs around the library. The town pays the electric and water bill for the library.

In this case, work performed by the public works and the utilities costs are indirect costs. Kickbucket reports all expenses paid out of the $100,000 budget as direct costs.

Example 2:

The Cabeza de Vaca Memorial Library pays all its own bills out of a budgeted amount of $12,000 a year appropriated expressly for library purposes by Coronado County. However, the library does not actually handle the funds directly. The library encumbers amounts out of the funds, sending the invoices to the county offices for payment as they receive bills. Besides the $12,000, the county also picks up the tab for health insurance for the library staff.

In this case, the health insurance benefits are an indirect cost. Also, the time spent by the county accounting department in handling the library's accounts may be reported as an indirect cost.

You may claim indirect costs as local support for library service. However, in submitting your form, the State Library requires that you enclose with your annual report a statement from a city or county official claiming indirect aid to the library. Reporting indirect costs is optional and should only be done if you need them to meet maintenance of effort for system membership.

Expenditures for Salaries and Benefits

The annual report form contains questions about salaries and benefits. Salary and benefit information is of great interest to other librarians across the state and nation. Other public libraries need to have current information on how much other libraries are paying on salaries so they can budget salaries similarly. The State Library and library researchers also need to be able to judge if the earnings of library employees are increasing and the rate of increase.

Report money paid directly to permanent staff members as salaries. Do not include amounts you pay to staff from a temporary agency.

Benefits refer to any item or service supplied to employees at the expense of the library beyond their direct base salary.

Benefits may include some or all of the following:

- Health insurance
- Social Security
- Dental insurance
- Life insurance
- Workers' compensation
- Disability insurance
- Pension
- Tuition reimbursement

Expenditures for Library Materials

The next set of expenditures on the annual report form are those for library materials, that is, books and other items available to the public. Again, libraries often find it difficult to reconstruct at the end of the year how much they spent for library materials. This is especially true if they do not keep their own financial records and have to reconstruct from city or county records.

When you report the number of items purchased on your annual report, it is better to report the different types of materials (books, serials, audio-visual materials, etc.) separately. If you cannot determine this at the end of the year, you may report all materials as books.

If you find this year that you cannot determine amounts you or your town or county spent for different types of materials, consider ways to get this information for next year's report. You can explain to the accounting department that you need to report this information at the end of the year. You can ask that they keep separate records for you. Or you can keep an informal list of type and amount of orders as you send them out.

The different categories of library materials are:

Print materials. Print materials are defined as consisting mainly of words on paper. This includes books, government documents, bound periodicals, pamphlets, and Braille.

Serials. Serials are publications that appear at regular or irregular intervals. These can be magazines, newspapers, journals or even reference materials that appear annually.

For the annual report, consider an item a serial only if you have a subscription to it. If it is an item that you purchase separately each year, as with a reference book, count it as a print item.

Microforms. Microforms refer to both microfiche and microfilm. Report any amounts you spent for either of these types of materials as microforms.

AV Materials. Audio-visual materials include any items that store sound and pictures in ways which require special equipment to view and/or hear them other than microfilm, microfiche, and computer software.

The following are examples of audio-visual materials:

- books on cassette
- videos
- records
- compact disks
- audio tapes
- book/tape media kits

Some libraries buy other items as well. These items might include, but are not limited to, the following:

- computer software
- toys
- tools
- art prints
- sewing patterns
- sculpture
- maps
- globes

Your library might buy other special items for public use. Report any amounts you spent on items such as these on the *Other Materials* line of the form. You should not report office supplies as *Other Materials*, but include them with *Other Expenses* instead.

Materials Expenditures and System Membership

TO QUALIFY FOR SYSTEM MEMBERSHIP A PUBLIC LIBRARY MUST OWN AT LEAST ONE ITEM PER CAPITA OR SPEND 25% OF ITS BUDGET FOR MATERIALS

Library System membership rules require all libraries to have at least 7,500 items. However, there are no minimum requirements for materials expenditures, provided the library has at least one item per capita. If you have fewer than one item per capita, 25% of your expenditures must be for library materials until the collection reaches one item per capita.

Example

The Mockingbird Memorial Library serves a population of 26,450 people. The total collection size for the library is 15,280 items. Because there is fewer than one item per person in the service area, the library must spend 25% of its total annual expenditure on the collection. Last year the library spent $50,000, of which $14,000 were for books and other library materials. $14,000 is greater than 25% of $50,000 so the Mockingbird Memorial Library was accredited for system membership in the upcoming year.

Expenditures for Furniture and Equipment

Amounts spent for furniture and equipment should be included under Furniture and Equipment expenditures. Such amounts are sometimes considered "capital" expenditures. Do not report capital expenditures for furniture and equipment here.

Please see the discussion of capital vs. operating costs on the following page.

Operating Expenditures

What areas of expenditures have we left out? Mainly just those for building maintenance, fees, and services engaged on a contractual basis. All these miscellaneous expenditures are lumped together as "Operating Expenditures."

Examples of Operating Expenditures are:

- Office supplies and postage
- Utilities: electric, water, telephone, gas
- Building and grounds maintenance
- Fees including database and membership fees to belong to a computer consortium
- Travel, professional conferences, dues, continuing education costs
- Contractual costs: consultants, temporary services, maintenance agreements, insurance, auditors

What are Capital Expenditures?

The State Library asks you to report Capital Expenditures separately. But what exactly are "capital expenditures?"

A capital expenditure is a payment for any cost which is not part of the ongoing, day-to-day operational expense of running the library and paying salaries. Usually, capital expenditures pay for building expansion, renovation, or other major, one-time projects. Automation projects are also sometimes treated as capital costs.

There are two reasons for reporting them separately:

1. Capital expenditures use one-time-only funds and not ongoing library support.

2. They are not counted as part of "maintenance of effort," that is, library funding which will help qualify a library for system membership.

You may ask, why is this the case? After all, money for libraries is money for libraries and ought to be counted, right? The following example illustrates the types of problems avoided by not allowing capital expenditures to count toward maintenance of effort.

Example:

For the past three years, the average cost of library service in the town of Klink has been $45,000. This year, the town has decided to add an addition onto the building that will cost $25,000. The mayor is reluctant, however, because expenditures for the library would rise to $70,000. He reasons that the town could reduce the overall operating budget to $30,000 and, when combined with the capital amount of $25,000 would increase the total appropriation for the library to $10,000 more than the year before. Sue, the librarian, reminds the mayor system membership benefits depend on maintaining operational support for the library and that capital expenditures don't count toward operational support. Because of this, the mayor reconsiders reducing the operating budget. Otherwise, the town would have reduced the actual operating budget of the library by $15,000, or 30% less than the year before.

Expenditures and System Membership

One of the statistics that the State Library looks at in determining your system membership eligibility is how much money your town or county spent for library service last year. To qualify for system membership, the amount the local funding authority spends on the public library must meet or exceed the average spent over the last three years. This is always true except in cases where the population the library serves has declined for the year.

Example 1:

Dave, librarian at the Trump Public Library, gets a call from the mayor of Trump. The mayor wants to know how much the town has to pay to support the library and maintain system membership. Dave tells him that over the last three years, the public library has received the following amounts in local government support:

Year 1:	$ 13,500
Year 2:	20,000
Year 3:	21,000
Total:	**$ 54,500 / 3 = $18,167**

Dave tells the mayor that local support has to meet or exceed the average of these three years or $18,167. The mayor agrees and Dave can expect at least $18,170 in the coming year.

Example 2:

The town of Feelgood has been spending an average of $150,000 for library support and intends to spend at least that much in the current year. Also, the county of Tamale, in which Feelgood is located, has spent $3,000 per year over the same period. This year, Tamale County decided to stop paying for library service. This will cause the average local support of $153,000 to fall below the three-year average. However, with no county support, the library is also no longer obliged to serve county residents living outside the city limits. Therefore, the drop in population assigned to the library means that the library continues to meet maintenance of effort for system membership.

Local Funds and Local Government Sources

On the annual report form, you are asked to divide your library's expenditures between what was spent from "local funds" and "local government sources." But what is the difference?

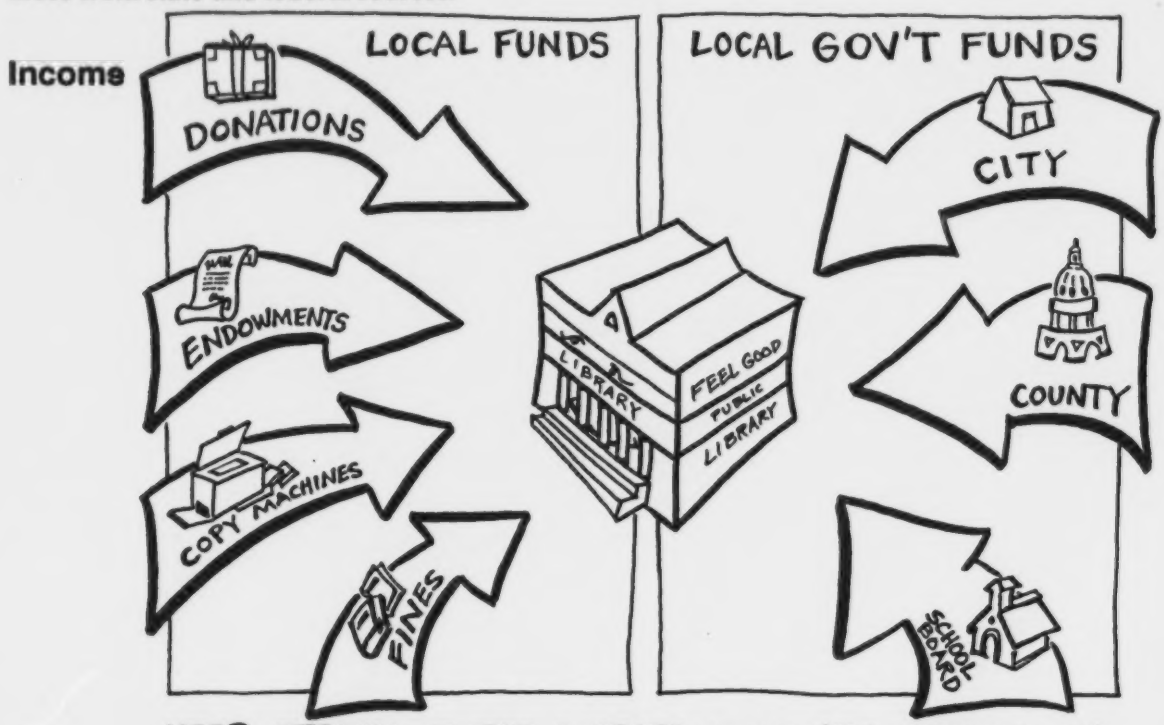
Local funds include all sources of income that come from within the service area of the library, such as:.

- Local tax support
- Fines
- Fees
- Donations
- Endowments
- Memorials

Local government funds are just the amounts that come from local taxing authorities. Local taxing authorities are one or more of the following:

- City tax
- County tax
- School district

Non-local sources are any funds other than those listed above. Usually, non-local funds are those from state and federal sources.



The next part of the annual report form asks you to report how much money your library received, that is, income. As with expenditures, you are asked to break down income according to where it came from. You will have to either keep the financial records in the library or get reports from your city or county accounting department. Let us first look at why the form has questions about income and how you should report it. We can then discuss how to keep track of income.

Why Report Income AND Expenditure?

You may wonder why you have to report income and expenditure. There are various reasons. In the first place, the amount of money spent might not be the same as the income for the same period.

Also, you are asked to report both because both are important for different reasons. They tell different stories about the library. Income shows the total amount of money the library received during the year. It is an indication of the financial health of the library. Expenditure is a measure of service. The greater the level of expenditure for books, personnel, buildings and other services, the greater the level of service delivered.

Imagine a library that has an income equal to $15.00 per capita. You might say that library was relatively well-supported, right? On the other hand, what if that same library spent only $7.00 per capita in the same year? Wouldn't you have second thoughts about the management of that library and the service it was offering?

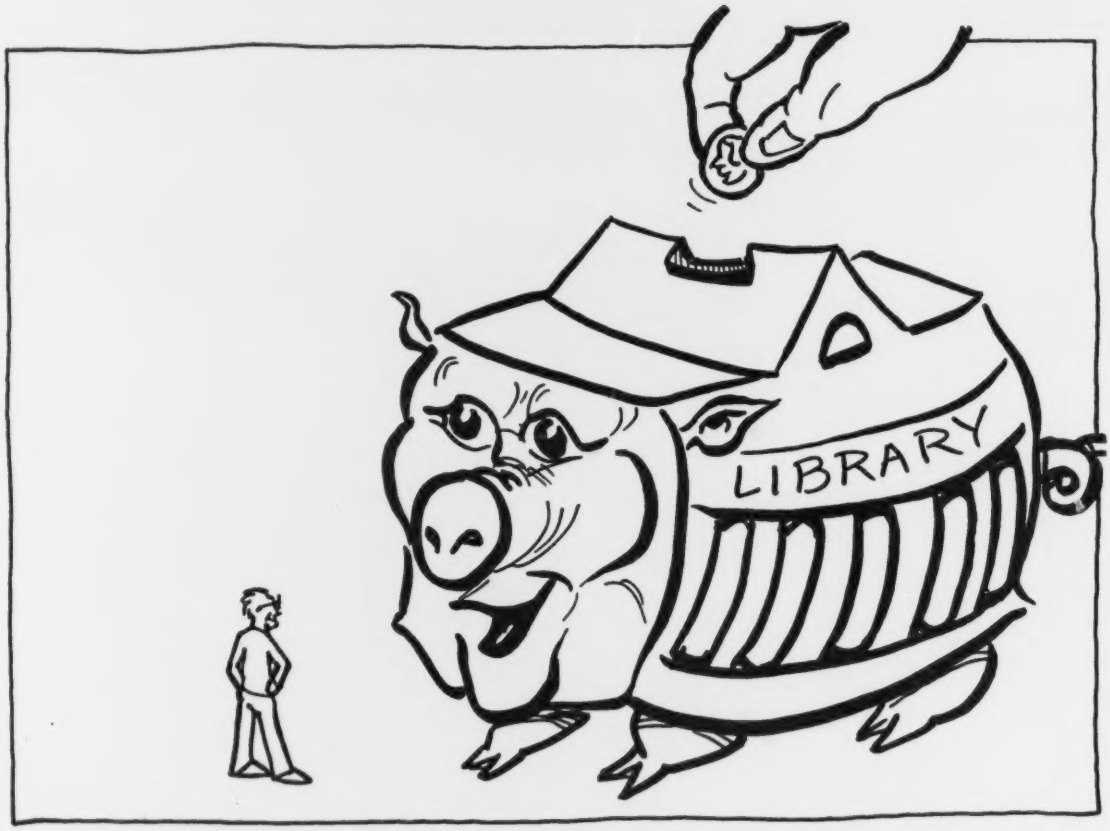
Income by Source

You are asked to report income by source because a library may have income from a variety of sources. You need to know who is paying for library service and how much. Taking money from a particular source may impose requirements on those whom the library serves. For budgeting and planning purposes, you should fully understand the implications.

Example:

The Bluebonnet Public Library serves the 12,000 residents of Bluebonnet with an annual budget of $130,000, or more than $10 per capita. About 5,000 people live outside the city limits in Nopalito County. The library has always charged a non-resident fee of $15 for county residents who live outside the city limits of Bluebonnet.

The county has now decided it wants to pay the library $10,000 per year for library service so the 5,000 county residents who now have to pay for a library card could get one for free. If the town were to accept the county funds, the library would be required to serve the population of the county and would no longer be allowed to charge the non-resident fee. The library board realizes that accepting the money would increase the service area to 17,000 persons, in effect lowering the per capita income for library service to $8.23. The board of the Bluebonnet Library is considering refusing the money.



STATISTICS ABOUT LIBRARY INCOME INDICATE THE FINANCIAL HEALTH OF PUBLIC LIBRARIES IN TEXAS

What are LSCA funds?

LSCA stands for Library Services and Construction Act. LSCA funds are federal funds given to State Libraries in all states to administer for a variety of purposes. LSCA funds usually pay for library building projects, cooperative projects between libraries, and projects to enhance service to disadvantaged populations. Some of these funds are paid to libraries automatically as formula grant awards; others are given in the form of competitive grants.

Relatively few libraries in the state receive LSCA funds directly. However, if your library did receive any LSCA funds directly, you should report them separately on your form.

Capital Income

Just as there are capital expenditures, there is capital income.

Income from any source can be in the form of capital income. A common example is money appropriated to pay for a building expansion or renovation or for some other major project. Any one-time, extraordinary income should be considered capital income, such as an endowment, bequest or a foundation grant.

Keeping Track of Income

Keeping track of these various sources of income is an element of any basic accounting system. In setting up a bookkeeping system for your library, you should pay attention to categories of receipts. Establishing such a routine once will be easier and less time-consuming than trying to reconstruct these figures at the end of the year. If your city or county accounting department handles your financial records, ask them to keep track of your income by source.

If they will not, you may find that you want to set up an independent system for use in the library. Again, you should refer to:

Alley, Brian and Jennifer Cargill. *Keeping Track of What You Spend: The Librarian's Guide to Simple Bookkeeping*. Phoenix: Oryx Press, 1982. 96 p.

LIBRARY COLLECTION AND SERVICES

The next major portion of the annual report relates to the type of services offered by your library. The two broad categories about which the form asks you to report are library's collection of books and other materials and programming and other activities you offer. These are very important statistics because they indicate the level of library service and use in your community. Combined with statistics from other libraries, they create a picture of library service statewide.

Collection

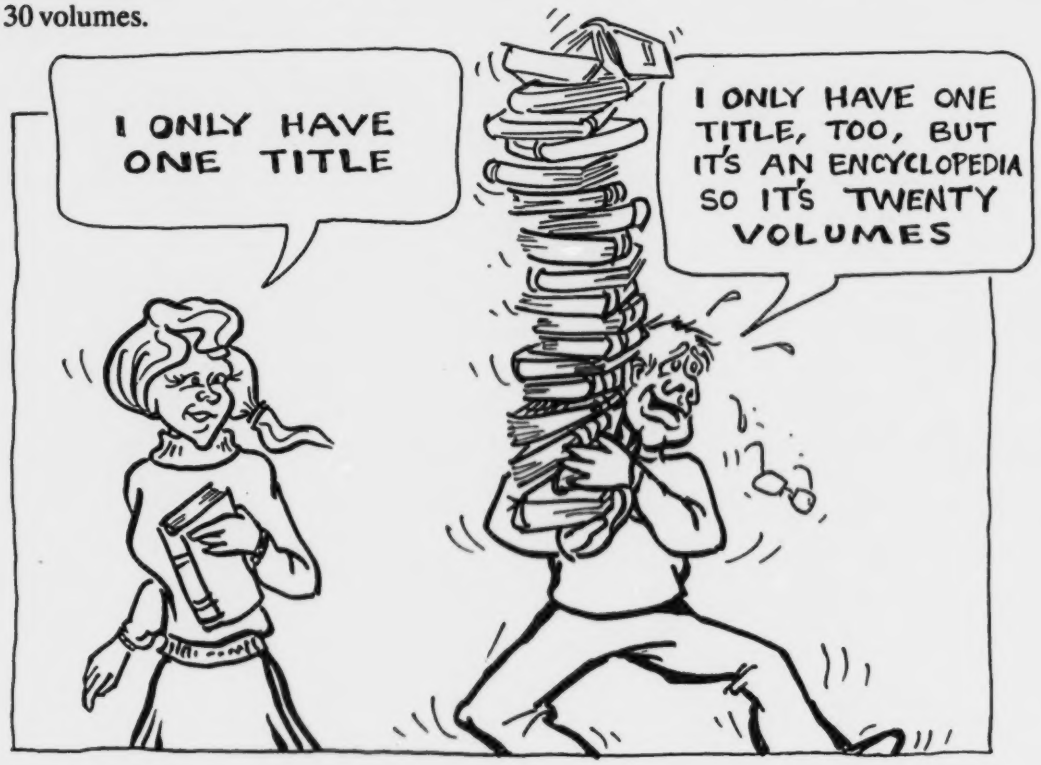
The number of items owned, when measured against other factors such as population served (items per capita), becomes an effective way to evaluate the service you offer your patrons. You can take the information for your library and compare it to the same statistics from other libraries. In this way you can relate your library's collection and services to "the rest of the world."

Ironically, one of the most difficult questions on the report is one which might seem easy at first glance. How many books do you own?

The problem comes in deciding what is a volume and what is a title. Say you have five copies of *Huckleberry Finn*. These copies are: two hardcovers, a paperback, an abridged juvenile edition, and a large print edition. Do you have one title and five volumes or five titles and five volumes?

The easiest rule of thumb is, if you treat them as separate titles in your catalog and shelf-list, report them as separate titles. In other words, if the paperback is the same edition as the hardcover (same date of publication, number of pages, publisher, etc.), then report the two hardcovers and the paperback as three volumes, one title. The same cataloging record cannot describe both the juvenile and the large print editions. Therefore, record them as two volumes and two titles.

With multivolume sets, reporting is easier. Count a 30-volume encyclopedia as one title and 30 volumes.



COLLECTION: TITLES VS. VOLUMES

If you have never kept accurate records on the breakdown between volumes and titles, there is no easy formula to use to estimate. The proportion of duplicate titles in a collection is a matter of an individual library's collection development philosophy and acquisitions policies.

If your library usually buys only one copy of most items, your duplicate volume count will probably be very low. This means that the number of titles reported will be almost the same as the number of volumes. If you are a larger library with several branches or a library that routinely buys multiple copies of popular works, the percentage of duplicates will probably be higher. This means that the number of volumes may be significantly higher than the number of titles. In some libraries, the number of volumes may run as much as 40% higher than the number of titles.

What is a Book?

This is not a trick question: essentially a book is what one usually thinks it is. The technical definition of a book is:

"A nonperiodical printed publication bound in hard or soft covers, or in loose-leaf format, of at least forty-nine pages, exclusive of the cover pages; or a juvenile nonperiodical publication of any length bound in hard or soft covers."

This definition covers paperbacks, graphic novels (of at least 49 pages), manuals, loose-leaf materials, and children's comic books (of any length, but not if they are serial publications such as *Superman*, *Batman*, etc.).

Do not include with this count books which come as part of a media packet (that is, with a tape or record) as a book. Count the whole packet as a single media item.

Cataloged vs. Uncataloged

The form asks you to report uncataloged as well as cataloged items in your collection. What is the difference? A cataloged item is one which appears in the public catalog of materials owned by your library. An uncataloged item is one that does not appear in the catalog.

Uncataloged items are usually, but not always, paperbacks. Typically, the library circulates uncataloged materials on some kind of an honor system or keeps only minimal circulation records for them. Also, in the case of libraries with automated collection records, an item may be retained on the shelf without having been converted (the copy linked to an electronic record for the item). In such a case, unconverted items are treated as uncataloged items.

For purposes of system membership, the State Library considers paperbacks – but only part of them – as part of the total collection.

You are allowed to count the number of uncataloged materials that equals 10% of your cataloged collection.

Example:

The Piney Woods Library has 20,000 cataloged books and another 4,000 which are uncataloged. They report 2,000 of the uncataloged items as part of their collection because 2,000 is 10% of 20,000, the number of cataloged items owned. This gives Piney Woods a total collection reported of 22,000 items.

Other Types of Materials

Government Documents. Your collection may contain such items as the federal budget, materials from the State Library, drivers' education handbooks, or materials circulated from your local school board. These are all government documents. The way you handle these items in your library determines how you report them. If you catalog them and put them on the shelf like other materials, count them as serials. If you shelve, catalog or circulate them differently from other materials, report them as government documents.

Audiovisual Materials. Audio-visual materials are defined more fully in the section on expenditures above. Again, examples of such materials are:

- books on cassette
- video tapes
- records
- compact disks
- audio tapes
- book/tape media kits

Machine -Readable Materials. Machine-readable materials refer mainly to computer software in various formats for public use. In addition to the common cases of CD-ROM products and commercial software, these types of materials can also include magnetic tape and batch cards.

Please report each title as one item, but do not report software which is used by staff only.

Periodicals. When counting and reporting periodicals, report only the number of subscriptions and not the number of individual items. If you receive more than one subscription of a particular magazine, report each subscription.

Methods for Determining Your Collection Size

With an Automated System

You can probably determine the size of your collection through reports generated by your automated circulation system. Most types of commercially available library automation software have report features. Such software will generate a report that tells you the size of your collection. Your software documentation will describe this function and further help is available from your vendor representative.

Unfortunately this method is available only to libraries with automated systems which have fully converted their records.

From the Shelflist

FIRST, MEASURE OFF AN INCH OF CARDS
COUNT THE NUMBER OF ITEMS IN THAT INCH OF CARDS
MULTIPLY THE NUMBER OF CARDS IN ONE INCH OF THE SHELFLIST BY THE TOTAL NUMBER OF INCHES OF CARDS IN THE SHELFLIST

If your library has a shelflist, you can measure a small portion of the shelflist and derive an estimate from that measurement. Statisticians call this type of estimating the total from a partial measurement "sampling."

To derive your collection size by sampling from the shelflist, follow these steps:

1. Press the shelflist cards tightly together and measure the total number of inches in the shelflist.

2. Using the same amount of pressure, measure one inch of cards in the shelflist. Count the number of titles contained in the inch.

3. Repeat step 2 at regular intervals (for example, count one inch in every foot, three feet or other pre-established interval) until you have measured at least seven sample inches at various places in the shelflist.

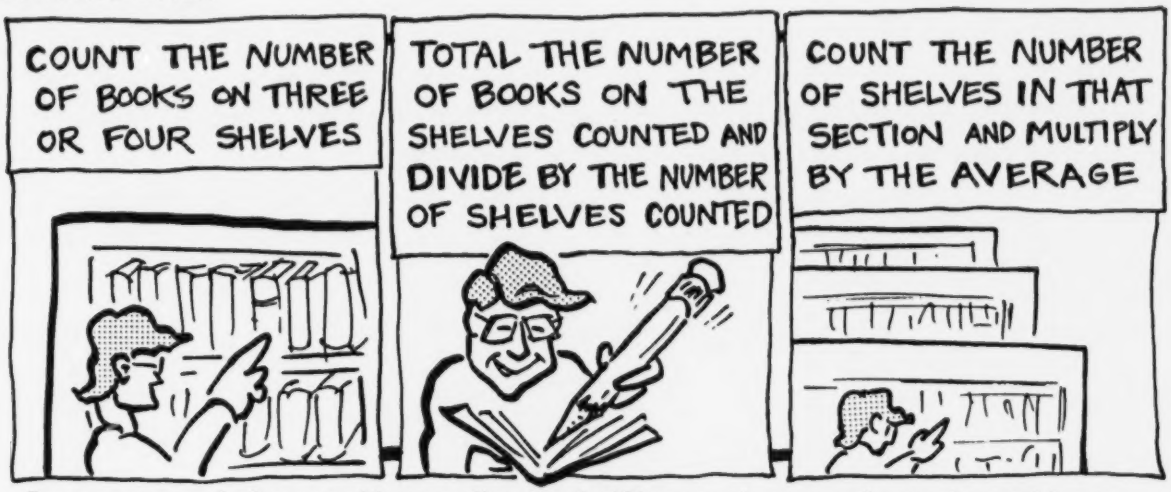
4. Average the number of titles per inch in the samples. If any sample varies from the average by more than four cards, repeat steps one through four, applying pressure more uniformly to the cards.

5. Multiply the average titles per inch by the total number of inches of cards in the shelflist.

The drawback to this method is that it does not allow for materials that have been lost if cards are not pulled from the shelflist. It also does not allow for multiple copies of an item recorded on one shelflist card.

Adjusting for lost materials. Judge how many materials are missing from a random sampling of the shelflist or catalog against the shelf and circulation records. Take at random a number of items shown in the catalog or shelflist for one area of the library (fiction, nonfiction, children's picture books, etc.). Locate these items either on the shelf, among the currently circulating items, or items waiting to be reshelved. Any item which you cannot account for should be considered lost. Estimate a percentage of the total collection lost based on the sample.

From the Shelf


COUNT THE NUMBER OF BOOKS ON THREE OR FOUR SHELVES
TOTAL THE NUMBER OF BOOKS ON THE SHELVES COUNTED AND DIVIDE BY THE NUMBER OF SHELVES COUNTED
COUNT THE NUMBER OF SHELVES IN THAT SECTION AND MULTIPLY BY THE AVERAGE

Just as you can derive a total by sampling the shelflist, you also can estimate the total from a sample of items on the shelf. To derive an estimate for the total collection size from the number of items on a few shelves, use the following method:

1. In one particular area of the collection (fiction, nonfiction, juvenile fiction, picture books, etc.), count the number of items on at least five shelves (the more shelves counted, the more accurate the estimate).

2. Divide the total number of items on those shelves by the number of shelves counted.

3. Count the number of shelves in that area of the collection.

4. Multiply the number of shelves in that section by the average number of items per shelf in that area of the collection.

5. Estimate the number of that type of item checked out by counting the number of book cards. If there are too many to easily count, sample by the method of counting the cards in several one-inch batches of circulation cards. Then, multiply by the number of inches of book cards in circulation (the same method used to estimate the size of the collection by counting shelflist cards described above). Add this total to the estimated item count.

6. Repeat this process for the other types of items in the collection.

Keeping the Information Current

Once you have an accurate estimate (or actual count) of the items in the collection, you will need to keep the information current. A form can be easily developed to help with this process. Remember to:

1. Keep track of weeded, removed and lost items as well as additions to the collection.

2. Centralize the tallying of these statistics as much as possible.

3. Standardize the process as much as possible. That is, make sure everyone responsible for counting materials counts the same way and at the same step in the process (for example, when unpacking the box or when filing the cards).

Circulation

A circulation transaction is the act of lending an item from your library's collection. This usually means that the item will be used outside the library, though this is not always the case. What is important is that the staff has charged the item to a patron by some manual or electronic means.

You should report renewals as circulations. Also count items borrowed for patrons from other libraries at the time the item is charged to the patron.

Libraries with automated circulation systems should have no problem maintaining detailed daily, weekly or monthly circulation counts. Circulation reports are a feature of almost all commercially available library automation software.

How do libraries without computerized circulation systems keep track of their circulation?

Manual circulation requires the daily counting of whatever device is used to charge out materials. In most manual charge libraries, some sort of book card is used to charge out materials. Making a count of the daily circulation involves counting the cards and recording the number either in a ledger, on a calendar, or some other ongoing record. Library supply companies sell ledgers made specifically to record daily library circulation statistics with weekly, monthly and annual totals.

Examples of forms used to record circulation can be found in Appendix A of this manual.

For reporting purposes, the total annual circulation of all materials is required. Most libraries, however, record circulation figures for shorter periods, usually a month. Many libraries also keep counts for the various classifications of materials (juvenile fiction, adult fiction, picture books, etc.). Other libraries record circulation for different formats of materials (books, video tapes, recordings, art prints, etc.). These statistics provide extremely valuable data for use in evaluating the effectiveness of the library's collection and services. They are particularly helpful in determining how to build your library's collection according to the types of materials most used by your patrons.

Reference Questions

DECIDING WHAT QUESTIONS TO REPORT AS REFERENCE QUESTIONS CAN SOMETIMES BE TRICKY

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You may sometimes find it hard to decide which questions to consider reference questions. As a rule of thumb, ask yourself if answering the question requires a knowledge of the library collection and how to access it. If answering a patron's question requires knowledge or interpretation by the library staff of the library or its materials, then it is a reference question.

You should not report directional questions, queries about library policies or library services, activities, or the use of library equipment as reference questions.

Some libraries offer a service called Information and Referral, also called "I & R." This means that they direct individuals who need help to the agencies who can assist them. You should report questions of this type as reference even if the library does not offer a formal Information and Referral service.

Examples of reference questions:

How do you use the card catalog?
I've read all of Danielle Steel's books, can you recommend other similar authors?
Do you have any books by Raymond Chandler?
Do you have the address of...?
Where can I find the phone number of...?
How tall is the...?
Who was the first...?
Who wrote...?
Who do I call to get food stamps?

Examples of non-reference questions:

Where is the bathroom?
What aisle is 822.33 SHA on?
How much is the copy machine?
How many books can I check out at once?
Do you have a pen I can borrow?
Why doesn't this library have a smoking section?

The method a library uses to keep track of reference questions depends on many factors. The volume of questions received, the size of the staff and reference procedures are a few of the factors that determine how reference questions are recorded.

Many libraries find it enough to simply record the number of questions received. Others keep track of the number of questions by day and time. Keeping track of the actual question asked and the resolution of the question will reveal strengths and weaknesses of the collection and the library's success rate in answering questions. In libraries where questions are referred between offices or departments or handled by more than one staff member, the question is sometimes recorded on a form along with sources checked and the final disposition of the question.

A sample form used to track the status of a reference question is included in Appendix A of this manual.

However reference questions are recorded, it is important that staff be consistent in the method used. Staff should make recording the question part of the overall transaction.

Please remember to report on the annual report all reference questions asked regardless of whether they were answered or whether the question was answered from your library collection.

Counting Library Visits

Library visits refer to anyone who enters the library to use any service of the library.

Some libraries have mechanical devices by their doors that count every library visitor when she or he walks in the door.

Libraries without these counters can either record every person coming into the library, or they can sample library attendance. Taking a sample for library visits means that staff will count every library visitor over a specified period of time. You then multiply that figure to get an estimate for the year. For this method to work, the sample should be taken during times of moderate library use. Do not sample during the lightest or heaviest months of the year. Also try to choose a week with no programming or at least typical programming. April and October are usually good months in which to sample. Record the number of visitors in one week twice a year and multiply by 26. If sampling only one week, multiply by 52.

Some libraries like to know when people are visiting the library. A tally sheet can be devised that records either by morning, afternoon or evening, or even by hour. This information helps library directors and others make decisions about hours the library should be open and how much staffing will be needed.

Examples of forms used to record library visits are included in Appendix A of this manual.

LIBRARY VISITS MEAN THE NUMBER OF PEOPLE COMING INTO THE LIBRARY

Attendance at Programs

Program attendance is a separate figure from library visits. If an individual visits the library to attend a program, that same person accounts for one visit and one program attendance. If the program attendance is off-site, record one program attendance and no library visit.

Counting program attendance is as easy as counting the house at programs. The staff member conducting the program will usually make a count, but if this is inconvenient, another staff member should come in after everyone has arrived and count attendees.

It is not necessary that a program actually take place at the library to be counted as a library program. A program that is planned, sponsored or carried out by the library staff is a library program.

By the same rule, some programs are held in the library, but not sponsored, planned or staffed by the library. These programs should not be considered library programs and attendance should not be reported.

What if you have a series of programs – such as a series of storyhours – where the same people attend each program? In that case, you should record the attendance at each program. For example, if the same ten children attend three separate storytimes, you should report a total attendance of 30.

LIBRARY PROGRAMS DO NOT HAVE TO TAKE PLACE IN THE LIBRARY SO LONG AS THEY ARE PLANNED AND CARRIED OUT BY LIBRARY STAFF

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In-House Use of Library Materials

You should count items from the collection which are removed from the shelf for use in the library, but not checked out, as "in-house" use. Include in-house use of library materials on your annual report. Report materials used by the public and by the staff when assisting the public as in-house use.

Collecting this information usually involves a combination of methods. Count all materials left out in the library as they are gathered for reshelving. Materials which staff remove in the course of helping patrons, such as those used to answer reference questions, should be counted before they are reshelved.

Your count of library materials used in-house is valuable because it helps provide a complete picture of the use of your library's collection.

Standard Loan Period

Report as your standard loan period the number of days that most items in your collection are circulated. This will usually, but not always, be the circulation period for fiction, non-fiction, and children's books.

However, what if your library is a special case where most of the collection is devoted to one particular kind of material? Consider the following example.

Example

The Gulf Coast Public Library has an unusual situation: It is located in the local elementary school. The school has a very small collection, and consequently, most of the collection of the public library is devoted to children's materials. The library is also open to the public and checks out adult materials to local residents, but far fewer items than the library's stock-in-trade, juvenile books. The children's books go out for four weeks, while the adult books are loaned for two weeks. When Loretta, the head librarian at the Gulf Coast Library, filled out her annual report form, she correctly gave her loan period as four weeks, because that is the loan period for her standard type of material, children's books.

Library Programming

Libraries sponsor a variety of programs for all ages. These can be either one-time programs or a series of related programs. Some libraries even sponsor ongoing classes in a particular subject. Classes for adults are usually in literacy, English language or adult basic education. You will usually report activities for children as programs rather than classes. Your library may, however, offer computer or other types of classes for children. Include total attendance at classes and programs in the count for program attendance. The annual report also asks for information about what types of classes and programs your library has offered during the last year.

One-on-one tutoring in literacy or English-as-a-Second-Language should also be reported as classes.

OTHER INFORMATION ABOUT YOUR LIBRARY

Library Staffing and Salaries

The State Library uses the annual report to monitor the number, composition and salary levels of public library staff across the state. Report any staff member who holds a master's degree in library science from a library education program accredited by the American Library Association.

All staff positions should be reported as FTEs or Full-Time Equivalents. That is, if you have several part-time employees, their average weekly hours should be totalled and divided by 40.

For example, a library with one full time person and three part time persons who each work 20 hours per week should be calculated as follows:

1 full-time staff	40 hours per week
1 part-time staff	20 hours per week
1 part-time staff	20 hours per week
1 part-time staff	20 hours per week
Total hours/week	**100**

Divided by 40 = 2 1/2 FTEs

The form contains questions about the salary and hours of the head librarian. Many libraries use these figures in deciding what salary is fair for libraries of similar size. Researchers also use this information to determine what progress has been made in library salaries.

System membership requires that an employment contract exist with a head librarian. Report any compensation paid to the head librarian, but do not report benefits as a part of this figure.

THE QUESTIONS ASKED ON THE ANNUAL REPORT ABOUT LIBRARY STAFFING YIELD IMPORTANT DATA ON THE STATUS OF LIBRARY WORKERS IN TEXAS

Staffing and System Membership

The number and composition of the library staff is one of the quantitative standards which the State Library uses to accredit public libraries for system membership.

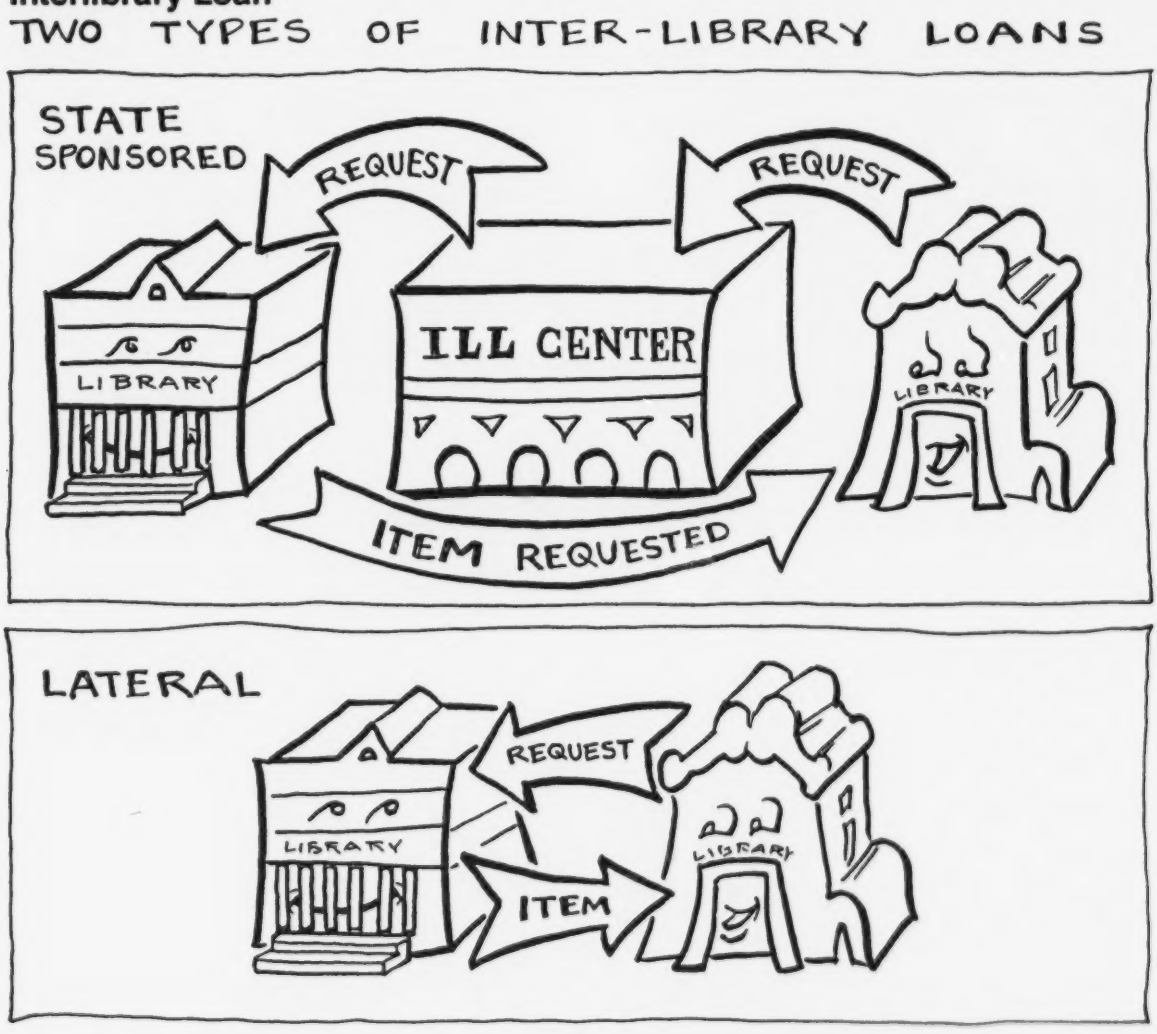
Rule 1.81 of the *Texas Library Systems Act and Rules for Administering the Library Systems Act* details the requirements which vary according to the population of the service area. Additionally, the head librarians of county libraries (that is, those receiving any county funds) also have to meet certification requirements. Again, these certification levels, or grades, vary according to the population of the service area. The last page of the *Texas Library Systems Act and Rules for Administering the Library Systems Act* lists these requirements.

Resource Sharing

The annual report asks a number of questions about resource sharing. Resource sharing generally refers to the exchange of library materials and services between libraries under different administrations. This is a definition broad enough to include various types of sharing.

Part of the mission of the State Library is to encourage and facilitate various forms of resource sharing. Resource sharing refers to use of the services, materials or staff expertise of one library by the patrons or staff of another library. The two types of resource sharing included on the annual report are interlibrary lending and reciprocal borrowing.

Interlibrary Loan



For the purposes of the annual report, interlibrary loans can be divided into two types:

1. Loans handled through a state-sponsored interlibrary loan office. There are ten interlibrary loan centers across the state. They are located in the Abilene, Amarillo, Austin, Corpus Christi, Dallas, El Paso, Fort Worth, Houston, Lubbock and San Antonio public libraries.

2. Loans directly between two libraries not under the same administration, known as lateral loans.

Borrowing libraries should report how many of each kind of loans they received from other libraries. Lending libraries are asked only to report the total loans provided to other libraries.

Interlibrary lending tends to generate a good deal of paperwork in both lending and borrowing libraries. Lending libraries should keep track of loans to other libraries at the time of check-out. Borrowing libraries can determine the number of items supplied by other libraries by counting the forms used to record the requests. Only requests that are filled should be reported on the annual report form.

A sample form used to keep track of the status of requests from other libraries is included in Appendix A section of this manual.

Reciprocal Borrowing

Reciprocal borrowing means letting patrons from other libraries use your library without restriction or fee. Here is the definition of reciprocal borrowing used by the Texas State Library:

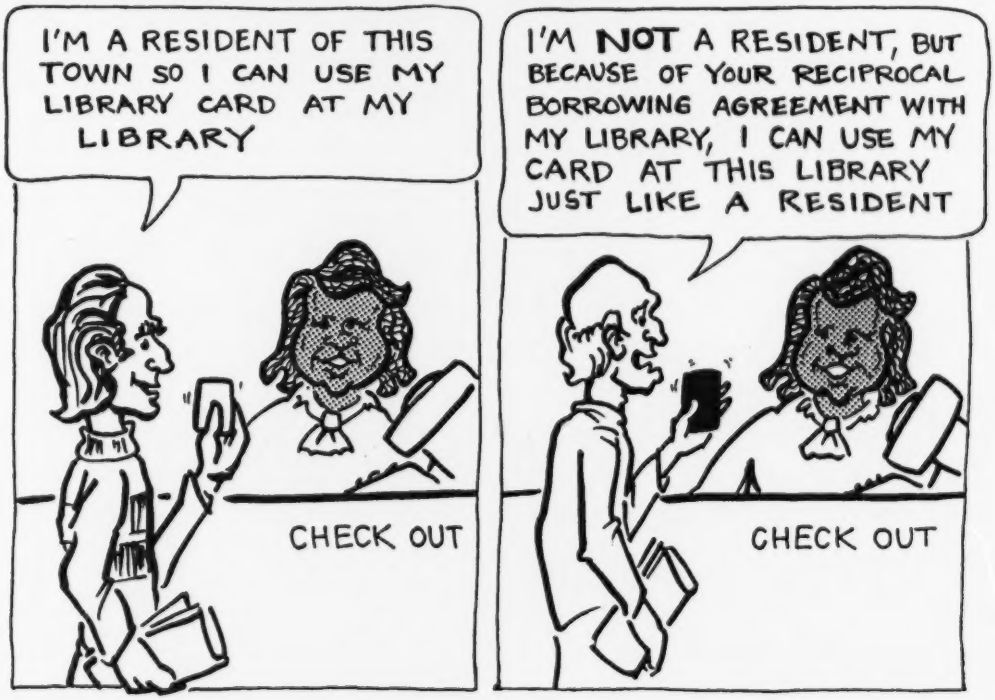
> *Reciprocal borrowing is a service established by an agreement among libraries to allow each other's patrons on-site use of facilities and direct borrowing privileges without direct charges, when those patrons would not normally be eligible to borrow materials.*

One of the key words in this definition is "on-site." The patron has to actually be able to come into your library and borrow the materials for that transaction to be considered reciprocal borrowing.

Report any reciprocal borrowing agreement that conforms to this definition. Also report the number of loans your library provided to patrons of other libraries according to this definition.

Libraries with automated circulation systems can keep track of reciprocal borrowing in a number of ways. How this is done will depend on your software. You can consult your documentation or your vendor for specific instructions and guidance on how to track this information.

Libraries with manual circulation systems will need to develop a paper method for tracking loans to outside borrowers. This need not be more complicated than tallying each circulation as it is made or counting book cards at the end of the day.


I'M A RESIDENT OF THIS TOWN SO I CAN USE MY LIBRARY CARD AT MY LIBRARY
CHECK OUT
I'M NOT A RESIDENT, BUT BECAUSE OF YOUR RECIPROCAL BORROWING AGREEMENT WITH MY LIBRARY, I CAN USE MY CARD AT THIS LIBRARY JUST LIKE A RESIDENT
CHECK OUT

KEEP SEPARATE TRACK OF ITEMS CHECKED OUT UNDER RECIPROCAL BORROWING AGREEMENTS

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Non-Resident Fees

Before discussing non-resident fees, it is important to define resident and non-resident. The State Library assigns a population to be served to a library depending on its sources of funding. The process of assigning population becomes complicated when several libraries within a county receive funding from several sources. Stated simply, if a particular jurisdiction funds a public library in any amount, system membership rules require the library to serve all residents of that jurisdiction without fee.

Example 1:

Within Farfetched County, there is only one public library, the Snakedance Public Library. Because Snakedance receives funding only from the town of Snakedance, the library serves only the residents of the town. They are not required to serve any Farfetched County citizens living outside of Snakedance.

Example 2:

Jambalaya County has three public libraries: Larry Memorial Library, the Curly Library and Moe Public Library. Each of these libraries gets support not only from its town, but also from the county. Therefore, the State Library assigns each library a population consisting of its own residents as well as a portion of the county residents. In this example, none of the public libraries can charge any use fee to any resident of the county since the libraries get city as well as county funding.

How much of the county population is assigned to each library in a case like *Example 2* above? The portion of county residents the State Library assigns to each library is the proportion of residents of the town to the total number of residents of the county. The larger the population of a town, the more county population is assigned to it. And again, when we speak of "assigning population" to a library, we do not mean individual residents are assigned to a particular library. Any resident of a county is entitled to use any library in that county that receives any county money.

Non-resident fees are the fees a library charges to residents of any jurisdiction which does not pay to support the library. Libraries in different jurisdictions may enter into a mutual agreement where they waive their right to charge each other's patrons a non-resident fee. In those cases, the libraries have entered into a reciprocal borrowing agreement with one another.

Other Fees

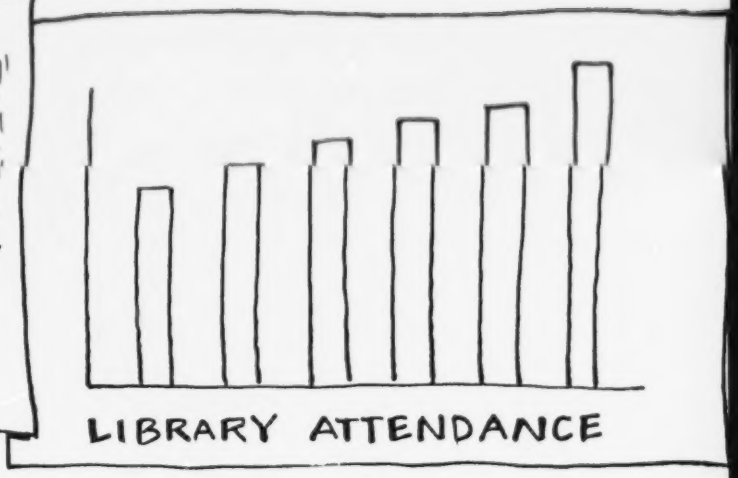
Libraries charge fees for other services as well. The Library Systems Act Advisory Board determines what a library is permitted to charge for while continuing to qualify for system membership. The specific list of allowable charges is given in rule 1.72 of the *Texas Library Systems Act and Rules for Administering the Library Systems Act*. This paragraph is reprinted directly on the annual report form. Report any fees you charge not specifically listed in the rule.

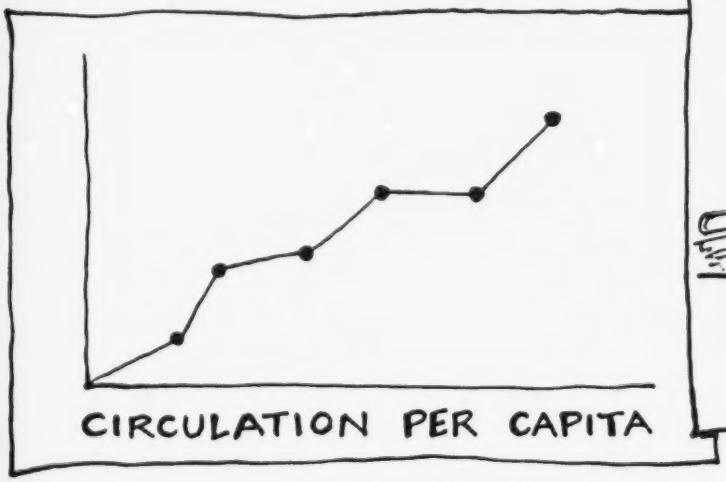
Hours That the Library Is Open

The report form asks for the total number of overlapping hours that your library was open during the year. This means the total actual hours service was available from all outlets combined.

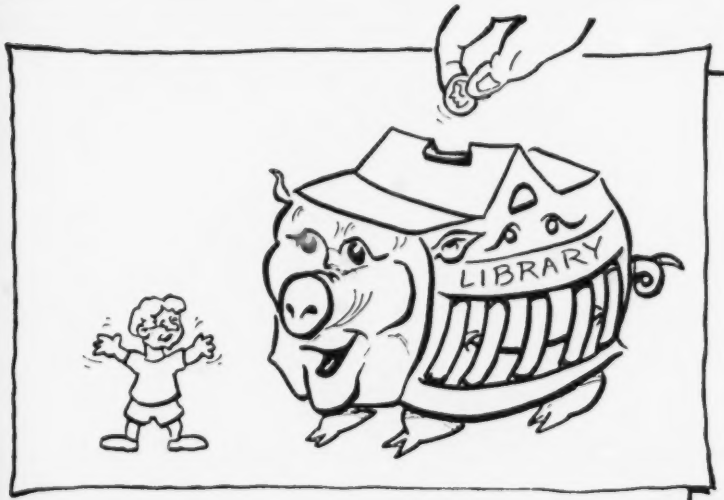
If your library has only one outlet, just give the total number of hours the library was open during the year. This figure should reflect your normal weekly hours times 52 weeks, minus any hours you were closed for holidays, emergency closings or other reasons.

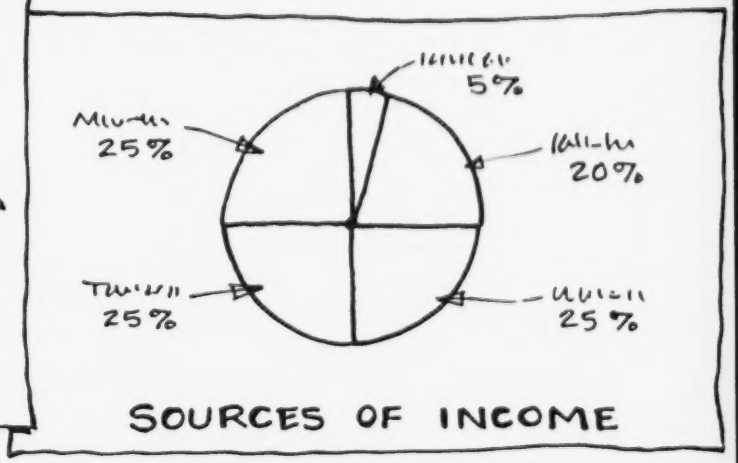
For libraries with multiple outlets, provide the total annual hours of all your outlets combined. Again, this figure should reflect actual hours the outlets were open.


LIBRARY ATTENDANCE


CIRCULATION PER CAPITA

CHECK OUT


LIBRARY


5%
25%
20%
25%
25%
SOURCES OF INCOME

THE VALUE AND USES OF STATISTICS

In the introduction to this manual, we mentioned the importance of library statistics as a management tool in your library. Unfortunately, many libraries do not make full use of statistics as a tool to justify their program, measure their effectiveness and pursue increased funding. Now that we have discussed what information you collect and report to the State Library, let's look at ways you can use those statistics in your library.

The Use of Statistics to Justify Your Program

Librarians can use statistical data on the local level as a way to justify programs.

Example

Nancy, Director of the Lasso Loop County Library, persuaded the library board to allow her to offer a summer reading program for the first time this year. The board stipulated, however, that at the end of the program, she be able to demonstrate that the program had been effective enough to justify its continuation next year. Nancy kept program attendance figures, library attendance figures, and circulation figures for the summer. By comparing them to previous years, she was able to demonstrate that the program had caused an increase in program attendance, as well as a dramatic increase in circulation even among adult materials. Not only did the program justify itself, but she could show the full impact of the program on library use.

The Use of Statistics to Measure Effectiveness

Another local use of library statistics is measuring overall program effectiveness. Output statistics, when shown as a factor of population, are excellent measures of the effectiveness of library programs. Such figures might be circulation per capita, reference transactions per capita, library visits per capita, and so forth.

Example

Two years ago, the Rattlesnake Public Library implemented a collection development policy for the first time. The policy included a weeding schedule, acquisitions guidelines, a gift books policy and other features. Some of the staff had misgivings about turning down donations and weeding books out of the collection. The circulation rate, however, increased from 6.1 to 6.8 items per capita—over 10% in one year—with no change in the size of the service area or any other major change in library policy. The staff and administration of the library could clearly evaluate the effectiveness of the new collection development policy.

Libraries with computers and graphic programs can use statistics to create charts and graphs to dramatically illustrate various aspects of library growth, change, and usage. Many library directors find the use of such visual demonstrations of data to be an effective way of presenting library facts to library boards, local governing bodies, library staff, and the public.

Sample graphic presentations of statistics are included in Appendix B of this manual.

Other Statistics You Could Collect

In this manual, we have only discussed collection of statistics which the State Library requires you to include on your Annual Report. Let's take a moment to discuss briefly other statistics that you could easily collect and which could provide you with valuable information about your library.

Registrations. No questions about the number of registered borrowers using your library appear on the annual report. Nevertheless, the number of current registrations is an important indicator of the level of use of your library. If you have an automated system, you can easily determine the number of active users. In a non-automated library, this information will have to be derived from sampling the registration files in much the same way that the shelflist is sampled to derive the size of the collection. The number of current registrations is most useful as an indicator of use when expressed as a percentage of the total population served.

Materials availability. Many libraries keep track of how well the library collection serves the needs of library users. Materials availability refers to the rate at which patrons find items owned by the library on the library's shelves. This is usually a simple calculation comparing the number of items a patron searched to the number found on the shelf. The problem is that the only way to get this information is to ask the patron, which usually requires some form of survey.

Fill rates. These refer to the rate at which the library collection has particular items for which patrons are searching. Fill rates can be done for title, author or subject. Like materials availability, fill rate information should be derived from patron surveys.

Document delivery. This measure refers to how quickly requested materials are supplied to the patron. This is an easily collected statistic and will indicate how responsive your library is to the needs of your patrons. The information can be collected by tracking all requests for a period of time, perhaps once or twice a year. The tracking can then be repeated at the same time in successive years to monitor progress.

These and other statistical measures of library service are fully discussed in Van House, Nancy, et. al. *Output Measures for Public Libraries*, 2nd ed. Chicago: ALA, 1987. This volume contains several sample forms to use to collect many of the library statistics we have been discussing in this manual.

Using the Texas Public Library Statistics

The *Texas Public Library Statistics*, published annually by the State Library, contains all the data submitted by Texas public libraries on their annual report forms. Many libraries find this data useful in creating comparisons to their own libraries in order to lobby for increased funding.

Example

Tom, Director of the Limestone Memorial Library, wants to persuade his town to increase the overall budget for the library. He needs to prove his argument that the $3,000 he gets to run his library is far below average. From the *Texas Public Library Statistics*, Tom finds comparison data for other libraries serving comparable populations across the state. Tom is able to demonstrate to the town council of Limestone that the library falls well below the average for similar libraries in overall expenditures, expenditures per capita and salaries.

Also, the State Library makes several simple calculations of the data you submit to produce certain measures for your library. These measures are published in the local library tables of the *Statistics*. These measures include circulation per capita, collection turnover rate, and income per capita. The *Statistics* also contains several analytical tables comparing libraries of similar size across the state.

How the State Library Uses Public Library Statistics

Once you have filed your annual report, the State begins to use your data to put together a picture of the status of Texas public libraries.

The State Library enters the data into a computerized database from which the annual *Texas Public Library Statistics* is generated and distributed to every public library in the state. The *Statistics* gives local libraries the data needed to compare themselves to other public libraries.

Staff at the State Library use the data throughout the year for a variety of functions. Sometimes individual libraries request detailed statistical information. In answering these requests, the staff uses the statistics database to generate the information requested. The State Library also examines the data in the course of its ongoing assessment of the status of local public libraries service statewide.

The State Library uses the data in another way. In much the same way a local library uses the data as a planning tool, so does the State in its process of long-range planning for statewide

library development. By looking at the status of Texas in comparison to other states and to national averages, State Library staff, working with librarians from across the state, can make more informed decisions about what directions statewide library development should take.

After all the data has been entered into a database, the State Library sends particular elements of the data to the U.S. Department of Education in electronic format. The Federal State Cooperative Service for the collection of public library statistics (FSCS) receives this data from all the states.

FSCS merges the data and creates an annual report called *Public Libraries in the 50 States and the District of Columbia*. This government document is available to anyone interested in public library issues and will be used by library researchers and others in need of detailed information about public libraries across the country.

Appendix A

Sample forms for collecting library statistics.

Some libraries use forms such as the one on page 55 to keep track of how many of various types of materials they received.

ITEMS RECEIVED

Date	BOOKS				AUDIO - VISUAL MATERIAL				TITLES	VOLUMES
	Adult Fiction	Adult Non-Fic.	Juv.	Juv. Non-Fic.	Record-ings	Micro-Film	Media Kits	Videos		
TOTAL										

You could use a form of this kind to keep track of your expenditures.

DISBURSEMENTS

Check #	Date	Payable to:	Amount	Salaries	Benefits	Books	Audio-Visual	Serials	Microfilm	Other	Furniture & Equipment	Other
64												
TOTALS												

This form can be used to record daily receipts on a monthly basis.

Month _____ 19 _____

RECEIPTS

Date	Overdue Fines	Damaged/ Lost Books	Lost Cards	Copy Machine	Donations	Totals
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						
21						
22						
23						
24						
25						
26						
27						
28						
29						
30						
31						
TOTALS						

This is a sample of a form used to track a variety of daily statistics including circulation and attendance.

DAILY STATISTICS
DATE_____

ATTENDANCE:

PROGRAM ATTENDANCE:

CIRCULATION:

ADULT	JUVENILE
BOOKS:	
VIDEOS:	
CASSETTES:	
MAGAZINES:	
OTHER:	

CASH RECEIPTS:

FINES:

COPY MACHINE:

DONATIONS:

LOST CARDS:

LOST ITEMS:

DAMAGED ITEMS:

OTHER:

Some libraries use this type of form to keep a monthly total of their daily circulation.

Month _____ 19 _____

DAILY CIRCULATION

Day	Adult Books	Children's Books	Videos	Compact Disks	MAGS	PAMS
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						
21						
22						
23						
24						
25						
26						
27						
28						
29						
30						
31						
TOTALS						

Libraries who wish to know their hours of peak usage may use a form like this to track visits during the day.

LIBRARY VISITS

DATE	VISITS	TOTAL

You could use a form like this to keep a tally of library visits for several days.

LIBRARY VISITS

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
9 - 10							
10 - 11							
11 - 12							
12 - 1							
1 - 2							
2 - 3							
3 - 4							
4 - 5							
5 - 6							
6 - 7							
7 - 8							
8 - 9							
TOTALS							

Some libraries use this type of form to keep track of the status and resolution of reference questions.

REFERENCE REQUEST FORM

Name:_____ **Date:**_____

Phone:_____ **Ext.:**_____

Question:_____

Date needed by: _____

Sources already checked: _____

ANSWER

Source	Information Found

This form can be used to tally program attendance. It also shows which types of programs have the best attendance.

PROGRAM ATTENDANCE

DATE	PROGRAM TITLE	NUMBER OF PARTICIPANTS

You could use a form of this type to record interlibrary loans requested by patrons.

Date _____

ILL REQUEST FORM

Name _____

Phone _____

Library Card # _____

Not needed after _____

Book

Author _____

_____

Title _____

_____

_____

_____

Place _____ Date _____

Publisher _____

ISBN _____

When cited _____

Periodical Article

Periodical Title _____

_____

Volume _____ Date _____

ISSN _____

Article Title _____

_____

Article Author _____

_____

Pages _____

When cited _____

FOR STAFF USE

Date ILL received _____

Date referred to ILC _____

Response from ILC _____

Other referral _____

Date item received _____ Due Date _____

Date item returned _____

This form can be used in libraries which handle many interlibrary loans.

INTERLIBRARY LOAN MONTHLY REPORT

_____

Month Year

1. Requests filled by this library

   a. ILL requests _____

   b. Other requests _____

   c. Total _____

2. Requests not filled by this library

   a. ILL requests _____

   b. Other requests _____

   c. Total _____

3. Requests referred by this library via telephone to ILC

   a. Filled _____

   b. Unfilled _____

   c. Total _____

4. Requests referred by this library to another library other than ILC

   a. Filled _____

   b. Unfilled _____

   c. Total _____

TOTAL ILL TRANSACTIONS _____

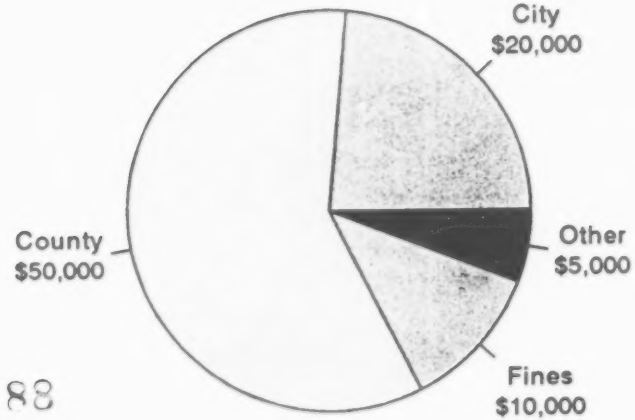
Appendix B

Sample graphic presentations of library statistics.

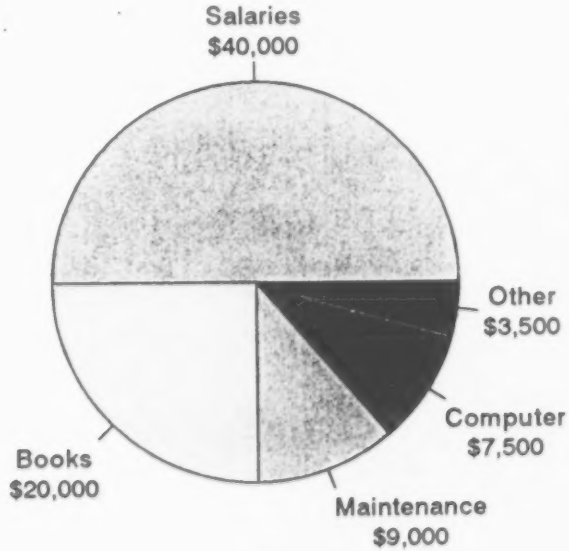
Circulation v. Expenditure
Per Capita 1985-1990

Line graphics can be used to highlight significant trends or relations between trends.

Library Income and Expenditure
1991



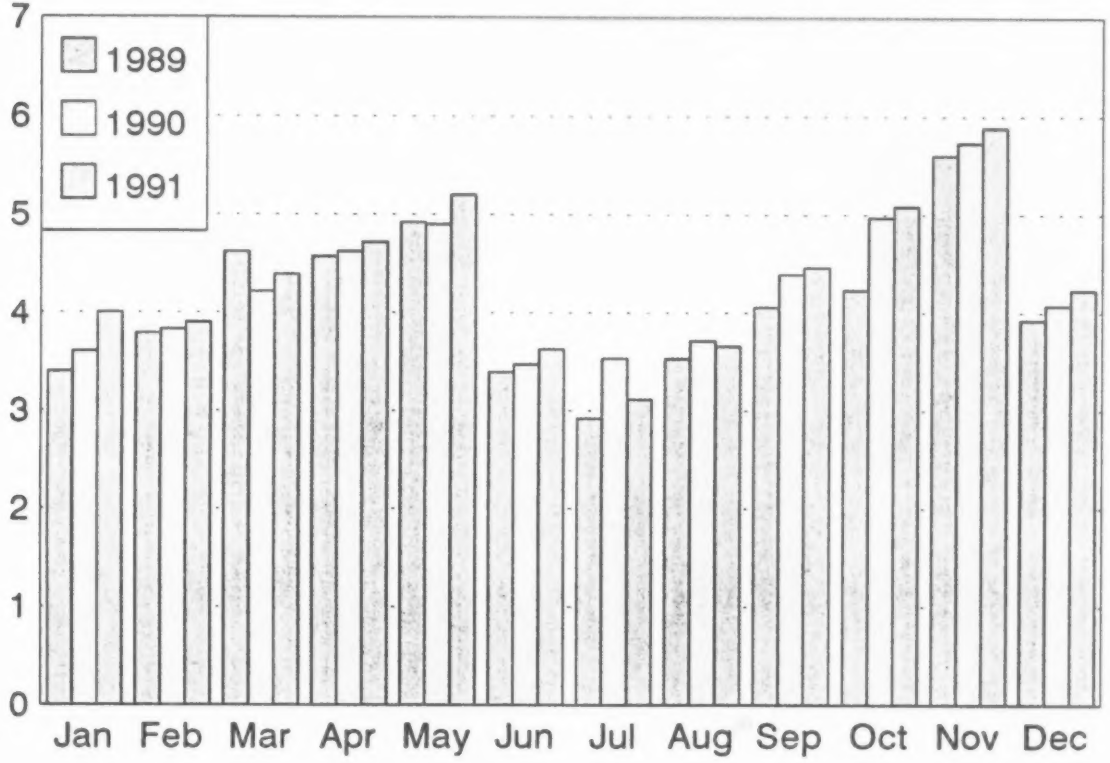
Income



Expenditures

Pie graphs show the relations of parts to the whole. You could use this type of graph to show composition of the collection, circulation by material type or attendance by program type.

Monthly Circulation 1989-91



90

Bar graphs show relations in series of data. Use bar graphs to show trends in circulation, reference transactions, number of library users, income or expenditure.

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Appendix C

FY 1992 Annual Report/System Membership Application Form.

ANNUAL REPORT
FOR LOCAL FISCAL YEAR 1992

This form is due at the Texas State Library three months after your 1992 fiscal year ends. All data applies to your library's 1992 fiscal year.

The local fiscal year covered by this report began _____ **and ended** _____.

Library Name _____ County _____
(As you wish it to appear in the directory)

Mailing Address _____ - _____
street or p.o. box city zip code +4

Street Address _____ - _____
(if different) street city zip code +4

Phone _____
area code number extension

Telefax _____
area code number

Head Librarian _____
first name last name

Person completing _____
form (if different) first name last name position

Board Chair _____
first name last name

Mailing Address _____ - _____
street city zip code +4

Friends President _____
first name last name

Mailing Address _____ - _____
street city zip code +4

Outlets and Users

Number of branch libraries _____

Number of bookmobiles in use _____

Number of other public service outlets (collections in nursing homes and jails, stations, etc.) _____

Has the main library building(s) or any branch library been renovated, expanded, or new construction completed within the period covered by this report?

_____Yes _____No

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Categories of Expenditures

Salaries and Wages		
Library Staff	1 a	
Plant Operation, Security and Maintenance Staff	1 b	
Employee Benefits		
Library Staff	2 a	
Plant Operation, Security and Maintenance Staff	2 b	
Subtotal Wages and Benefits (add 1a thru 2b)	3	
Collection		
Print Materials (exclude serial subscriptions and microforms)	4	
Serial Subscriptions (include all physical formats)	5	
Microforms (except serial subscriptions)	6	
Audiovisual Materials	7	
Other Materials	8	
Subtotal Collection (add 4 thru 8)	9	
Miscellaneous		
Furniture and Equipment	10	
Other Operating Expenses	11	
Subtotal Miscellaneous (add 10 + 11)	12	
Total Direct Operating Expenditures (add 3 + 9 + 12)	13	
Indirect Costs (Optional; attach documentation if claimed)	14	
Total Operating Expenditures (add 13 + 14)	15	
Capital Outlay (Do not include expenditures reported above)	16	

VAILABLE

Local Financial Effort

Of the amount shown in Library Collection Expenditures (Item 9), how much was expended from local funds only? 17 _____

Of the amount shown in Total Operating Expenditures (Item 15), how much was expended from

- Local funds only (include government sources)? 18 _____
- Local government sources only? 19 _____

Note: See Instructions (page 6) for definitions of "local funds" and "local government sources."

Library Income By Source

"Operating Income" is money received by the library for the current and recurrent costs of operation, including grants for special projects. "Capital Income" is money intended for major capital expenditures, construction, renovation, endowment fund deposits, or other extraordinary items. (Exclude interlibrary loan and system operation grants from both of these categories).

	OPERATING INCOME	CAPITAL INCOME
City or Cities	20 a _____	20 b _____
County or Counties	21 a _____	21 b _____
School Districts	22 a _____	22 b _____
Foundation & Corporate Grants	23 a _____	23 b _____
Federal Library Services & Construction Act Funds	24 a _____	24 b _____
Other Federal Funds	25 a _____	25 b _____
State Funds (do not include system grants)	26 a _____	26 b _____
Other Local Sources (interest, fines, donations from individuals)	27 a _____	27 b _____
TOTAL INCOME	28 a _____	28 b _____

If the library received funds from a city or county other than the one in which the library is located, list the appropriate cities or counties separately and indicate the total of the funds received from each city or county.

Cities or Counties Funding the Library	Amount Received
_____	$ _____
_____	$ _____
_____	$ _____

LIBRARY COLLECTION

		Titles	Volumes, Items or Physical Units
Books and Serials (exclude microforms)	29		
Uncataloged Paperbacks	30		
Government Documents (if in separate collection and exclude microforms)	31		
Microforms (include government documents)	32		
Audio Materials	33		
Films	34		
Video Materials	35		
Machine-Readable Materials	36		
Other Library Materials	37		
TOTALS	38		

Number of subscriptions currently received (periodicals and newspapers in any format) 39 _____

LOCAL LIBRARY SERVICE

Number of library circulation transactions 40 _____

Number of reference transactions received by your library 41 _____

Number of persons attending programs/presentations provided by the library 42 _____

Number of materials used in the library 43 _____

Number of library visits 44 _____

How long is your standard check-out period for books? 45 _____ days

ADULT EDUCATION

Did your library offer any of the following adult education services? (Check all that apply.)

_____ ABE - Adult Basic Education classes

_____ GED - General Education Development classes

_____ ESL - English as a Second Language classes

_____ Literacy tutoring or small groups

_____ ESL - English as a Second Language tutoring or small groups

_____ Family Literacy

_____ Workplace Literacy

CHILDREN'S SERVICES

Number of circulations of juvenile materials
(children's materials in all formats, excluding young adult materials) _____

Did your library offer any of the following services for children? (Check all that apply.)

_____ Baby Lapsit Programs for parents and babies (6 to 18 months)
_____ Toddler Programs for parents and toddlers (18 to 36 months)
_____ Preschool Storytime for children (3 to 5 years)
_____ Storytimes for Day Care Centers, Nursery Schools, or Preschools
_____ School-age Programs (Do not include Summer Reading Program)
_____ Library tours for children
_____ Computer classes for children
_____ Programs in elementary schools

Number of persons (juvenile and adult) attending children's programs provided by the library _____

LIBRARY STAFFING AND SALARIES

		Number of Full-Time Equivalents*
Persons Holding Title of Librarian		
• with master's degree from program accredited by ALA	46	_____
• other persons holding title of librarian	47	_____
All other paid staff	48	_____
Total library paid staff	49	_____

*Divide hours scheduled per week by 40 hours

How many hours last year did volunteers (including community service, Green Thumb, etc.) work in your library? 50 _____

What was the Head Librarian's annual rate of salary? 51 $ _____

How many hours per week is the Head Librarian currently employed in library duties? 52 _____ hours per week

RESOURCE SHARING

		Number of Requests
Interlibrary loan requests (exclude informational requests) filled by other libraries for your library users		
• Through a State sponsored Interlibrary Loan Office	53	_____
• Requests filled by any other method	54	_____
Interlibrary loan requests provided to other libraries	55	_____

BEST COPY A

Does your library participate in any reciprocal borrowing agreement?
(Reciprocal borrowing is an agreement between libraries that allows patrons from each library to borrow materials from the other without payment of a nonresident use fee.)

_____Yes _____No

If your library participates in a reciprocal borrowing arrangement, please list the libraries with which you have an agreement. _____

_____

_____

Number of reciprocal loans provided to patrons of other libraries 56 _____

Does your library charge a non-resident fee or deposit to persons living outside the library's service area?

_____Yes _____No

If yes,

Outside what areas (city, county, school district, etc.) does the fee apply? _____

_____

How many fee-paying non-resident borrowers are registered? _____

How many materials were circulated to fee-paying non-resident borrowers? _____

What is the annual cost of a non-resident card? $ _____

(If there is other than a flat annual charge, please attach a fee schedule.)

What was the total revenue from non-resident fees last year? $ _____

Does this revenue go to _____ the library
_____ the city, county, or school district
_____ other (Where? _____)

Does your library circulate materials to persons living outside the library's tax-supporting service area without a fee or deposit?

_____Yes _____No

If yes,

To what areas or groups do you provide free service? _____

_____

How many non-resident borrowers are registered without charge? _____

How many materials were circulated to non-resident borrowers without charge? _____

LIBRARY HOURS

Total number of hours during the year that the library was open. 57 _____ per year

The purpose of this question is to find out how many overlapping hours of library service were available to your patrons last year. This total should be reduced for any hours that any of the facilities were closed to the public (e.g., holidays, weather emergencies, staff development days, construction, repairs, etc.). Report every hour that any facility is open to the public during all of last year.

Count main library, branches, and bookmobiles in the following way. If, for all 52 weeks, the main library was open 50 hours a week and the two branches were open 42 hours a week (regardless of whether or not all are open at the same or different times), the total should be reported as 6,968 hours (50 + 42 + 42 = 134 times 52 weeks = 6,968).

AVAILABLE

SCHEDULE OF HOURS OF THE MAIN LIBRARY OR LIBRARY SYSTEM HEADQUARTERS

(If the library closes for the lunch hour, be sure to reflect this in the schedule.)

REGULAR-SCHEDULE	SUMMER-SCHEDULE
Sunday _____	Sunday _____
Monday _____	Monday _____
Tuesday _____	Tuesday _____
Wednesday _____	Wednesday _____
Thursday _____	Thursday _____
Friday _____	Friday _____
Saturday _____	Saturday _____
WEEKLY TOTAL _____	WEEKLY TOTAL _____

ADMINISTRATIVE USE ONLY DO NOT WRITE HERE	ADMINISTRATIVE USE ONLY DO NOT WRITE HERE

90

LIBRARY USE CHARGES AND FEES

Rule 1.72 of the Rules for Administering the Library Systems Act requires a public library to "provide library services without charge or deposit to all persons residing in the library's tax supporting political subdivision."

§ 1.72 Public Library Service

(b) The following charges are permitted at the discretion of the library's governing authority: reserving library materials; use of meeting rooms; replacement of lost borrower cards; fines for overdue, lost, or damaged materials in accordance with local library policies; postage; in-depth reference services on a contractual basis; photocopying; telefacsimile services; library parking; service to non-residents; sale of publications; rental and deposits on equiipment; and charges for the use of materials and machine-readable data bases not owned by the library, major resource center, or regional library system for which the vendor or supplier has charged a borrowing fee.

Please describe charges assessed to residents for any library services NOT listed in Rule 1.72 above. Also, please identify the fee structure. Use an additional page if necessary.

_____

_____

Does your library charge deposits or use fees to any of the groups below that reside within the library's service area? (Check any applicable groups):

_____New Residents _____Temporary Residents _____College Students _____Military

If the answer is yes to any of the four choices, please submit a copy of the policy authorizing this charge if the policy is not already on file with the State Library.

BRANCH AND/OR BOOKMOBILE INFORMATION

(Attach a separate sheet if more space is necessary. A library may submit its own published listing of branch hours and locations, if such a list is available. Population estimates listed below should be provided on published list.)

_____Branch

_____Bookmobile

Library Name _____

Mailing Address _____ - _____
street or p.o. box city zip code +4

Street Address _____ - _____
(if different) street or p.o. box city zip code +4

Phone _____
area code number extension

Telefax _____
area code number

Name of Librarian _____
first name last name

As part of a national program to collect data about public libraries, the U.S. Department of Education would like your best estimate of the size of the population served by each branch library and bookmobile.

This is an estimate of the service population of this branch or bookmobile. (Check one)

a. _____ Less than 1,000
b. _____ 1,000 – 2,499
c. _____ 2,500 – 4,999
d. _____ 5,000 – 9,999
e. _____ 10,000 – 24,999
f. _____ 25,000 – 49,999
g. _____ 50,000 – 99,999
h. _____ 100,000 – 249,999
i. _____ 250,000 – 499,999
j. _____ 500,000 or more

REGULAR-SCHEDULE

Sunday _____
Monday _____
Tuesday _____
Wednesday _____
Thursday _____
Friday _____
Saturday _____
WEEKLY TOTAL _____

SUMMER-SCHEDULE

Sunday _____
Monday _____
Tuesday _____
Wednesday _____
Thursday _____
Friday _____
Saturday _____
WEEKLY TOTAL _____

ADMINISTRATIVE USE ONLY
DO NOT WRITE HERE

ADMINISTRATIVE USE ONLY
DO NOT WRITE HERE

100

SYSTEM MEMBERSHIP APPLICATION FORM

Authorization to Apply for New or Continuing System Membership

LIBRARY NAME: _____ CITY _____

This Authorization for application should be completed only for the following reasons:

- Your library is applying for new membership in the Texas Library System
- Your library wishes to continue its membership in the Texas Library System for the upcoming state fiscal year (SFY 1994).

All signatures are necessary. Current members of the Texas Library System MUST obtain all necessary signatures if they wish to continue their System membership during SFY 1994.

Signatures of city secretaries, county clerks, and so forth **are not valid** substitutions for the signatures of mayors, city managers, or county judges.

IF you are unable to obtain all necessary signatures before this form is due at the State Library, THEN send the State Library all other pages **except this Authorization** and indicate approximately when the Authorization for Application will be forthcoming. After obtaining the required signatures, mail this page to the Texas State Library at your earliest convenience.

By signing this form, the applying library is certifying that the information presented in its Annual Report for Local Fiscal Year 1992 is complete and accurate.

AUTHORIZATION

_____	_____
SIGNATURE of Mayor, City Manager, or County Judge, or School Superintendent (Circle applicable one)	Typewritten or printed name
_____	_____
SIGNATURE of Head Librarian	Typewritten or printed name
_____	_____
SIGNATURE of Library Board Chair	Typewritten or printed name

DEADLINE FOR SUBMISSION OF THIS REPORT

This report is due ninety (90) days following the close of your local fiscal year.

- One completed form should be returned to the Library Development Division, Texas State Library, Box 12927, Austin, Texas 78711.
- Second completed form should be sent to the System Coordinator in your area.
- Third completed form is for your library's files.

QUESTIONS

If you have any questions about this survey, please write or call your system coordinator or contact Bell Clarke at the following address:

Ms. Bell Clarke
Library Development Division
Texas State Library
Box 12927
Austin, Texas 78711
512/463-5466